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# **Leadership Capacity Building for Sustainable Educational Reform in the Turkish Republic of Northern Cyprus**

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**Thesis submitted to the University of Nottingham for the degree of  
Professional Doctorate in Education**

**JULY 2010**

**To Su Mertkan-Ozunlu**

**My Pride and Joy**

# Abstract

This study examines the recent educational reform initiatives in North Cyprus with particular emphasis on (1) building head teachers' capacity to lead instructional development and organisational improvement, and (2) improving the system capacity to support head teachers in the effective undertaking of their roles. The study frames the current domain of headship in North Cyprus within the external system infrastructure in which head teachers operate, illustrates the national framework for building head teachers' capacity to lead, and looks at how the existing opportunities for leadership capacity building can be enhanced, along with the system infrastructure, to provide a context within which the enhanced capacity can be realised. The study employs a mixed-method design with an inductive drive, where the qualitative paradigm has a dominant and the quantitative has a supplemental status. Surveys, qualitative interviews, and documentary analysis were used to answer the research questions the study explores.

Findings clearly show that the case of North Cyprus is an instance of 'vernacular globalisation'. Implemented in a very 'glocal' context in response to very particular problems, the reforms are influenced by local histories and narratives of the nation as much as by such global imperatives as the heightened need for up-skilled citizens. The study reveals that head teachers operate within a highly centralised system, which lacks infrastructure, a strong focus on teaching and learning, and credible monitoring and evaluation systems. It is common for heads to spend a significant amount of time dealing with bureaucratic and operational matters, and questions of instruction and professional development seem to be beyond their remit. This is a condition that needs to change. There are also significant problems with the professional development opportunities for head teachers that must be addressed.

**Keywords:** Educational Reform, Educational Change, Educational Leadership, Capacity-Building, Education Policy



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# **Chapter 1**

## **Introduction and Background to the Study**

### **Introduction**

A global agenda for education policy is emerging (Ozga & Jones, 2006). Around the world nation states are engaged in educational reform, becoming 'smarter,' to serve the global economy while avoiding the high social risks associated with it. Since the 1990s many countries have initiated reform agendas designed to address challenges such as the gaps between the 'top and bottom' in achievement (often equated with effectiveness), while also enhancing the efficiency of education systems. Over time, these agendas have accelerated in scale, scope, and ambition (Fullan, 2000; Levin, 1998). These policy imperatives have been shaped, driven, and constrained by multifaceted, complex interrelationships between context and culture-bound socio-political dynamics and the globalized economic and social environments (Ball, 1998). Globalization has restructured policy environments and redefined the rhetoric of education in intended and unintended ways. Consequently, the roles and expectations for those operating at different levels of the education system have changed significantly (Fink, 2003; Fusarelli, 2002). Today, schools in many countries operate within highly centralised policy environments characterised by decentralised management, accountability regimes dominated by testing, and varying degrees of contractualisation and privatisation (Hopkins & Levin, 2000; Ranson, 2003; S. Ranson, 2008; Sugrue & Mertkan-Ozunlu, 2009).

Recent socio-political developments have made this global agenda felt in the Turkish Republic of Northern Cyprus (TRNC), where a large-scale educational reform agenda was developed in a very specific 'glocal' (Robertson, 1995) context to improve standards in

teaching and learning. The case of the TRNC represents an instance of 'vernacular globalisation' in which local histories and narratives of nationhood have had as much impact on reform as the 'travelling' global policies (Mertkan-Ozunlu & Thomson, 2006, 2009). This study examines this reform initiative.

## **Background to the Study**

I come from a divided island. Cyprus was partitioned into 'North' and 'South' by a UN-mandated 'green line' in 1964, following inter-communal hostility and violence. The division was formalized 1974. This partition is the most visible scar of the long-lasting, widely-disputed 'Cyprus problem', the result of diverse nationalist realities and aspirations (Bryant, 2001; Fisher, 2002; Stavriniades, 1999). I am a Turkish Cypriot from the northern part of the island. My country, the Turkish Republic of Northern Cyprus, is not politically recognised and is subject to a range of international embargoes. The southern part of the island, the Republic of Cyprus, was established in 1960 as a bi-communal federal republic. The Republic of Cyprus became a member of the European Union in May 2004; EU membership is deferred in the northern part of the island. Hereafter in the dissertation the northern, majority-Turkish-speaking part of the island will be referred to as the Turkish Republic of Northern Cyprus (TRNC), and the southern, majority-Greek-speaking part of the island will be referred to as the Republic of Cyprus (RoC). 'Cyprus' refers to the whole island, north and south.

When I started my doctoral studies in the summer of 2003, I was living in the TRNC and had been teaching at the Eastern Mediterranean University since 1998. In 2000, I was awarded a Cambridge Chevening Scholarship and granted unpaid leave to do my MPhil in Teaching and Teacher Education at the University of Cambridge. I was among the few who had returned to the TRNC after graduate work equipped with a highly-respected degree earned abroad. In December 2002, I was provided with the opportunity to design



and manage a project to teach students how to learn, and was made responsible for training teachers to build their capacity to do so. It was based on my doctoral proposal, which was accepted to the doctoral programme at the University of Nottingham. Having observed a large number of my students suffer from weak learning skills, I was keen to do my research on the topic and was eager to support my students in developing their cognitive and metacognitive skills to match their performance to their potential. I was also interested in exploring the impact and sustainability of this intervention.

Today, I am writing this dissertation in London where I live. I am among the first Turkish Cypriots to migrate to England after the accession of Cyprus (the RoC) to the European Union (although the accession itself has facilitated my travels, it had no direct impact on my decision). Like many other Turkish Cypriots from the TRNC, where EU membership is deferred, I am a European citizen through my Cypriot citizenship. I am entitled to all the benefits of the European Union including the freedom to live and work within the EU. This 'freedom' expands the market for out-migrating Turkish Cypriots while lessening the economic, social and cultural embargoes at the personal level. I am an example of brain drain, where skilled worker migration to richer countries further impoverishes the sending nation (Crush, 2002; Selassie & Weiss, 2002). This is not to ignore the positive elements of the impact of brain drain on the exporting countries, in this case the TRNC. On the contrary, with the increased availability of new ICTs, and easier and cheaper international travel, there is now a heightened possibility of sustained and regular transnational diasporic experiences unimpeded by national borders (Portes et al., 1999; Tololyan, 1991, 1996). These combined trends create new opportunities to strengthen interactions of diasporic communities with home and recipient countries, and to afford these communities the opportunity to accumulate human capital and generate economic remittances without being severely constrained by geographic locality, as Chapter 4 argues (Teferra, 2004). It is, however, important to emphasise that benefits accrue only when out migration is well-managed, which is a rarity in the TRNC.

The dissertation I am writing concentrates on an entirely different topic – building leadership capacity for sustainable systemic reform. As I reflect on the evolution of this study over the past few years, five 'critical incidents' (Tripp, 1993), or crossroads, crowd my mind as being indicative of the way in which this dissertation deepened over time. The first occurred while working with change and reform literatures during course work, whilst at the same time piloting a teacher/learner development project in the TRNC on teaching how to learn. Reading about organisational change in theory and living this change on a day-to-day basis in practice pushed me to the boundaries of my comfort zone and helped me better appreciate the complexities involved. I wrote my second assignment on this pilot project. The following field notes reflect how my thinking started to change by the time I submitted the second assignment:

*One day during my stay in Nottingham in the summer of 2003, I was talking to Andy Hargreaves about the pilot after attending his workshop on professional learning communities. He asked, "Do you think the impact will sustain after you leave?" to which I could not help but reply "I don't think so". Since then I completed the pilot. Research evidence leaves no doubt that the intervention was successful. However, when I think about its impact, I still do not think we have achieved sustainable impact. I cannot say this was one of my key aims when I first started, but having started to read about the reform literature, I now think differently. The issue is much more complicated than I thought it was when I first started. One of the students I was working with said "I was forced to learn how to memorise, not how to learn or think, miss. I had to. We were assessed on how much we remember, not how much we learn. All we had to do was to learn what was in the textbook and we would be safe. In time, I became really good at it"; yet another added, "I wish I had had someone to teach me how to learn in secondary school. I would not have wasted so much time". These students are not simply saying the intervention should have started earlier. They are talking about chronic*

*issues in the Turkish Cypriot education system that needs to be challenged – pedagogy, assessment, and system expectations – much bigger issue than I chose to see.*

I wrote the pilot project as action research. The experience was invaluable in showing me that change is messy, and comes with complexities, whether intended or not. It helped me to realise and respect the importance of the wider picture, and better understand why it is vital not to omit any part of the problem. As Hargreaves, Fullan and Elmore (among others) argue, short-term, isolated interventions do not lead to sustainable improvement. Factors contributing to the problem need to be addressed not in isolation, but as interrelated components, in order to achieve sustainable improvement.

The second critical incident is that of being a supporter of the political agenda for social and political restructuring and EU membership in the TRNC. The majority of residents of the TRNC were united support this change in the post-1974 political dynamics. The fourth chapter discusses this episode in greater detail. After attending a big demonstration in Nicosia, I wrote:

*The bubble burst. More than 70,000 people gathered in the Inonu square. They called for an identity they had lost years ago. They screamed for the voice they had strived to have but failed. First time in years, Turkish Cypriots felt the courage to want to be self-sufficient. First time in years, they had the courage to make public the things said in close circles, behind closed doors. First time in years, they wanted change and were ready to take to the streets. Anger was in the air. Anger of failing to be self-supporting, anger of not having a voice, anger of not having a recognized identity. But it made itself felt in songs written specially for the day. It made itself felt in the slogans, it made itself felt in the determination of people of all ages and professions to be there to support the activists of the new*

*political agenda. I was one of them. (journal entry)*

This was a particularly important time in the history of Cyprus. The people of the TRNC, who had suffered under crony capitalism for many years, finally found the courage to voice their dissent. They wanted transparency, democracy, a fair and just system. Supporters of the new political agenda came to power shortly after this demonstration. With them came the political desire and determination for socio-political restructuring, a significant part of which was the reform of the education system in the TRNC, better to prepare future generations for the expanding market. For the first time in years, I was hopeful that things could change for better in the TRNC and was not scared to believe that efforts would not be wasted. Not knowing exactly how, I felt keen to contribute.

The third incident is significant to the genesis of this dissertation. It was one warm evening in the spring of 2004 and I was frantically trying to refine the topic of this study. I was travelling from Famagusta to Nicosia with Dr. Dorothy Turner. She is a dear long-time friend from Canada who lived and taught in the TRNC for three years. She helped me learn how to listen for the unexpected and how to see with an unrestricted eye. She was on the island for a short time on holiday when we spoke about my dissertation topic. That evening I wrote the following:

*Dorothy asked:*

*Why don't you focus on North Cyprus? Just look around closely! It is pregnant with new dilemmas, challenges and changes. It would make a fascinating study and you are very well positioned to have a closer look at some of these challenges and dilemmas and to help your country overcome them. You are loaded with advanced inside knowledge of Turkish Cypriot culture, political and social structures in the North. Yet, you are rich with the academic knowledge and*

*the skills you developed through your studies abroad. Why don't you use this advantage to help your country to resolve some of these dilemmas and challenges? If you Turkish Cypriots don't have the courage and the motivation to do so, no one else will. Even if they do try, they would not be able to do it as well as you can. And the impact would be different. Just think about this.*

That evening Dorothy left me with a big question to struggle with. We did not talk about it for the rest of her stay, neither did we revisit it over our usual telephone conversations or discuss it electronically. Was she waiting for me to bring it up again for further discussion or had she forgotten about it? I did not know, but the latter was less likely. When I called her from London later that year, she was delighted to hear I had decided to concentrate on the educational reform movements in North Cyprus. She said "Good job. You will learn a lot about yourself and your country and you will be transformed by the experience." She was right.

The experience has profoundly influenced who I am and how I think about educational reform in general and education in the TRNC in particular. This dissertation represents the research enterprise as a complex phenomenon that cannot be detached from the researcher (Kamler & Thomson, 2006). At one level, it represents a reflexive exercise of my learning and transforming self as a doctoral researcher in relation to knowledge-in-the-making (Ellsworth, 2005), what I tried to achieve and what I learnt. In this dissertation my persona is put on the agenda, as well as the capacity building for systemic reform in the TRNC (Mertkan-Ozunlu, 2007).

The fourth 'critical incident' is deciding to apply some of the theory I was learning in my course work to shed light on the reform initiatives in the TRNC in general, and the challenges policy makers need to address in particular. This study was further developed during my doctoral research, and the findings at this early stage were used to compose

some sections of this dissertation. This decision was driven by my interest in the motives behind the reform initiative. I wanted to investigate the challenges and dilemmas policy makers need to address to make the reform vision a reality. The decision to exploit course work to develop my doctoral research provided me with the opportunity to develop a research study that would help policy makers to address some of the critical challenges I had identified myself in my earlier course work.

The fifth incident arose from my recognition, after I moved to London, that the word 'Cyprus' is commonly conflated with the Republic of Cyprus, and thus Cypriot is largely associated with Greek Cypriots. I wrote the following:

*People ask me where I am from, to which I habitually reply 'Cyprus', a word that immediately conjures up politically-laden images, the imagined community of 'Cypriots' and thus the question of who belongs. Very occasionally they ask whether I am Turkish or Greek Cypriot; more often they reply in Greek if they speak the language. Unable to speak Greek, I am forced to underline my nationality and ethnicity, which instantly disconnects me from the imagined 'Cypriot' community (field notes, 2005).*

Benedict Anderson stresses that print culture creates a medium through which emerges a crafted presence [i.e. a knowledge base], to which people contribute and imagine themselves as part of a constructed community. Print culture is thus an integral part of nation building (Anderson, 1991). Observing an unproblematic relationship between nation building and early print capitalism, Anderson fails to acknowledge the power of print media, consciously and unconsciously, to silence both histories that might run counter to the dominant crafted notion of a nation as well as the voices that fail to represent themselves. Power dynamics lead to the representation of the dominant community – the one that has the power and the capacity to craft a knowledge base. Communities whose

capacity building has been hampered by lack of political recognition are handicapped also in their attempts to create a knowledge base. This is the case for the TRNC. In other words, the process is not as straightforward as Anderson contends (Bryant, 2004). In contexts such as Cyprus Anderson's theory makes sense; but it is also in such contexts where its limitations are most acknowledged (Bryant, 2004).. Scholarly literature on education in Cyprus regularly and systematically conflates Cyprus with the Republic of Cyprus, and Cypriot with Greek Cypriot. The voices of the TRNC and Turkish Cypriots, fully one-third of the island's population, are largely ignored or silent. Anderson helped me see how (and understand why) education in Cyprus is thus, in my opinion, misrepresented.

Most educational narratives focus entirely on education in the RoC, equating it with Cypriot education, and conflating citizens of the RoC with Cypriots. This leads to the construction of a knowledge base that is misrepresentative of the contemporary educational scene on the island. It has serious implications for the advancement of a holistic or balanced knowledge base about education on the island because it fails to produce a construction of the imagined Cypriot community that is recognisable both by Turkish and Greek Cypriots. It is crucial to emphasise at this moment that I am not suggesting it is not important for researchers to work on their own context. It is. Nor am I making comments about the importance of this work. Each contribution listed in the following section does add to the body of scholarly knowledge – but it is not knowledge about Cyprus per se, but rather about only part of the island. I am pointing to the particular constructions of Cyprus evident in this body of scholarship, and suggesting that more work needs to be done to ensure that the other part of the island be better known and understood. It is this errand that this dissertation seeks to accomplish and it drives its significance from this. This dissertation is shaped by my desire to make a contribution to the available and fast-growing knowledge base about education in Cyprus.

My search was guided by the following over-arching questions:

- How is education in contemporary Cyprus represented within scholarly literature?
- How are TRNC and its educational issues situated within this representation?

I used such terms as Cyprus, North Cyprus, Cypriots, Greek Cypriots, Turkish Cypriots, Cypriot Education, Turkish Cypriot Education, and Greek Cypriot Education, to search (electronically and manually) a large number of academic journals and evaluation reports. 24 articles and 2 reports<sup>1</sup> were identified as directly addressing contemporary educational issues on Cyprus. This knowledge base largely equates Cypriot education with education in the RoC, and Cypriots with RoC citizens only. In doing so, it homogenises Cyprus and glosses over a shared heritage of struggle for identity and sovereignty. Throughout this literature Cyprus is equated with the RoC. The TRNC is invisible.

I deal with each of these themes in turn in the following section, as part of my larger attempt to redress this imbalance by offering a voice from the TRNC.

## **Some Common Themes: A Single Cyprus Education System?**

Common themes in this literature will be familiar to anyone acquainted with the international discourse on educational reform: the historical development of the education system; higher education in the EU context and global marketplace; the importance of in-service training and teacher development; and the influence of other social institutions (such as religion) in the educational sphere. The rest of this chapter deals with each individually.

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<sup>1</sup> See Appendix A for Table 1 summarising the articles and reports included in this review.



## **A Developing Cypriot Education System Post 'Independence'**

Examination of the articles reveals that the development of Cypriot education is presented within a historical construct that simplifies the complexities of the island. This is a construct that does not recognise the complex evolution of education on the island. The dominant narrative is of a single Cypriot education system that has passed through periods of turmoil and change and managed to maintain its direction and growth (Tsiakkios & Pashiardis, 2002). Scholars imagine a system rapidly expanding and developing since 'Independence' (Angelides & Leigh, 2004; Zembylas & Papanastasiou, 2003) and higher education scene facing increased demands since 'Independence' (McRoy & Gibbs, 2003). Some argue that the importance of education within this single system has increased as education has come to be considered the main means for increasing employment and socio-economic standards (Demetriades, 1989). A striking example of this singular construct is provided by Tsiakkios and Pashiardis (2002: 10)

This is a good point at which to mention a few general comments about the Cyprus educational system (CES) in order to set the context for the case study that follows. The CES has been an important subsystem of Cypriot society .... Polydorou (1995) adds that when the Ottoman Turks occupied Cyprus (1571-1878), education was not organized at all and they did not show any interest in the spiritual development of the Cypriots. It was then that the Church of Cyprus showed its interest in the education of children and started building schools in towns and villages. Most of the teachers were priests and the system was decentralized. Great Britain followed the same policy until the British government decided to colonize Cyprus (1878-1960). The CES became centralized as Maratheftis (1992) explains, because the aim was to control education and give the power to the director of education. After independence (1960-1974) the system remained centralized and started to develop rapidly both in a qualitative and quantitative way. The growth and prosperity of the CES who was interrupted

temporarily by the Turkish invasion in 1974, when 42 per cent of students lost their schools and 41 per cent of teachers were kept away from their workplaces by force (Ministry of Education 1992). Fortunately, with the co-operation of all stakeholders the problems were overcome quickly and education managed to continue its upward trend and has now reached adequate standards.

Though the geographically divided and ethnically rich condition of the island is better represented in some articles, it is common practice to ignore the existence of a separate education system in the TRNC, one with its own traditions, strengths and weaknesses. The following excerpt begins by acknowledging the distinction between North and South; however, the quotation ends by glossing over the existence of a separate system in the North:

In 1974, the island of Cyprus was divided into two parts. The internationally-recognized government of the Republic of Cyprus controls the southern two-thirds of the island, while the political entity "Turkish Republic of Northern Cyprus" controls the northern one-third. This has played an important role in the formation of economy, health, education and environmental policy. In a total land area of 9,240 km<sup>2</sup>, and a coastline of 648 km live 762,887 people. The capital is Nicosia. Almost all ethnic Greeks (78 per cent) reside in the southern two-thirds of the island, and Greek is the predominant language of that area. Similarly, almost all ethnic Turks (18 per cent) reside in the northern one-third; primarily, Turkish is spoken here. As for the religion, 78 per cent of the population are Greek Orthodox, 18 per cent are Muslim and 4 per cent are Maronite, Armenian, Apostolic, and other. About 98 per cent of males are literate; approximately 91 per cent of females are literate ([www.countrywatch.com](http://www.countrywatch.com)). Education is provided through pre-primary and primary schooling, secondary technical / vocational schools, special schools, third level institutions, and non-formal institutions and centers ([www.pio.gov.cy](http://www.pio.gov.cy)) (Skanavis and Sarri 2002: 529).

Like Skanavis and Sarri above, Pashiardis (2004) acknowledges the establishment of two separate communal chambers in Cyprus during the British colonial period. He, too, however, fails to recognise the existence of two separate educational systems on the island today and uses the term 'education system in Cyprus' interchangeably to refer to the system in the South and the system on the entire island during the colonial period. Koutselini and Persianis (2000) specify Greek Cypriots as *one of two* communities on the Island; however they still equate the RoC education system with Cypriot education and stress strong links between Greek education and Cypriot education.

Three significant legacies of religious schools mark contemporary Cypriot schools: first, even today priests are commonly addressed as teachers. Secondly, primary school teachers generally consider it essential to end their lesson with a moral conclusion. Thirdly, most teachers profess great respect for and loyalty to prescribed textbooks (Persianis 1978). A similar situation exists in Greece, with whom Cyprus has ... close historical, political and cultural links (same language, same religion, same customs, same sense of origin). For the last two centuries, Greek Cypriot education has followed the structure, curricula and syllabi of Greek schools, and textbooks have been sent free of charge by the Greek government. The tendency towards identifying the Cyprus education with that of Greece was intensified after 1930 when union with Greece became the target of political and even armed struggle. The predominant role of the nationalist educational culture, based on 'Greek learning', 'history' and the 'true and genuine dogmas of the Church' was boosted even more. Traditional educational culture has been internalised and is still believed to ensure the biographical and historical continuity of the people of Cyprus. (Koutselini and Persianis 2000: 505).

As Chapter 4 discusses in more detail, this is indeed a partial version of history. There is no single, unified Cypriot education scene evident on the island today, nor has there been

one in the past. Two separate education systems, each with a distinct character and objectives as well as dilemmas and challenges, have been present since the British colonial period, if not earlier (Bryant, 2004; Feridun, n.d.).

## **Increased Demand for Higher Education**

Another aspect of the Cyprus educational scene, as represented in the scholarly literature, concerns the increased demand for higher education in Cyprus. Though this trend might well apply to the TRNC, the literature is silent on the matter. Looking into factors influencing this upward trend in the RoC, Menon (1998) identifies seven factors, and concludes that the most influential of these is students' conviction that higher education provides an interesting and fulfilling experience, which leads to significant economic returns. In another study looking into rates of return to higher education, Menon (1997b) finds that school specialisation and gender play a critical role in return to higher education. Menon (2003) also reports that teachers' views on the mission of higher education are mostly humanistic. This construction argues that higher education institutions in Greece, UK, and USA are preferred by young people choosing learning in an international environment and that there is rapid domestic growth in the number of higher education institutions in Cyprus to accommodate those who choose to study at home (McRoy & Gibbs, 2003). The first state university is reported to have established in 1992 (Menon, 1998) and the higher education scene is presented as being under the monopoly of the University of Cyprus (Vrasidas, 2002). There are calls for the need for private colleges accommodating a large number of Cypriots to change from college to university status in order to be able to compete nationally and internationally and to fit into the European emphasis on competitiveness (McRoy & Gibbs, 2003; Vrasidas, 2002).

This work ignores entirely the presence of universities in the North, which have been established since 1979. Higher education is given high priority by residents of the TRNC

and a large number of students undertake undergraduate and postgraduate studies at home and abroad. Among the most common foreign destinations are UK, Turkey and USA. As in the RoC, the indigenous higher education sector in the TRNC has expanded rapidly, with eight universities now in operation. The total number of students studying in these universities in the TRNC in the 2006-07 academic year was 40,687. 25.4 per cent of these were from the TRNC, 67.2 per cent from Turkey, and 7.4 per cent from other countries. The biggest of these universities, Eastern Mediterranean University, is a state-trust university established in 1979 as the Institute of Higher Technology and later transformed into a university in 1986. In the 2006-07 academic year, it accommodated 34.9 per cent of the whole university student population. Of these, 27.3 per cent were from North Cyprus, 61 per cent from Turkey, and 11.7 per cent from other countries. The university maintains close relationships with global partners and offers internationally accredited programmes.

### **Improvement in Initial Teacher Education and In-Service Training**

Studies exploring teaching and teachers focus primarily on dilemmas and problems relating to teacher education. Again however, these relate primarily to the RoC. Findings suggest that: Cypriot teachers choose teaching for extrinsic rather than intrinsic reasons: those who hold more realistic perception of teaching are more satisfied (Zembylas & Papanastasiou, 2003), and future teachers' expectations in relation to work incentives are higher than those of current teachers (Menon & Christou, 2002). Such expectations can lead to the feelings of dissonance and decreased job satisfaction. Menon and Christou (2002) warn that it is imperative that teacher training programmes better prepare future teachers for the realities of the workplace and the teaching profession to help avoid dissonance and dissatisfaction.

The theory-practice divide in teacher education is also discussed. Although student

teachers seem to accept progressive ideas in teaching and learning, they fail to internalise and apply them in practice, and teach in conservative ways influenced by the traditional values of the Orthodox Church (Koutselini & Persianis, 2000). An important implication of this finding is that teacher education fails to influence beliefs and ideologies of teachers in the RoC. Research also portrays teachers at different stages of their career who show different concerns about curriculum implementation, and thus stresses the importance of designing and implementing intervention strategies relevant to the concerns of teachers (Christou, 2004). Critiquing policy makers' attempts to integrate technology into higher education institutions, Vrasidas and McIsaac (2001) claim that teacher training is not among the priorities of policy makers and that it is imperative to design pre- and in-service training programmes to train teachers to use technologies within real life contexts. It also appears that there is an urgent need for initial administration and evaluation, and continuous professional development activities for school administrators (Menon & Christou, 2002; Pashiardis, 1997).

Some of these concerns also affect teachers in the North of the island but this is not yet apparent in the research.

### **Influence of Greek Education and the Orthodox Church**

Parallels are often drawn between Cypriot education and education in Greece. A primary focus of education is the teachings of Christianity and the ancient Greek spirit (Pashiardis, 2004), teaching and learning by the traditional values of the Orthodox Church (Koutselini & Persianis, 2000), and the superiority of theoretical knowledge in Greek thought (Menon, 1997a). Comparing the science curriculum in textbooks used in Cypriot and Greek schools, (Koliopoulos & Constantinou, 2005) find that there are significant similarities. Needless to say, the presence of a Moslem community on the island, and the similarities between Turkish Cypriot education system and Turkish education system do not appear

as yet in these literatures.

Two papers differ in their approach to those outlined above. Pashiardis (2004) acknowledges the limits of his study as pertaining only to the south of the island and the Greek Cypriot community. Koutselini and Persianis (2000) recognise Greek Cypriots as a particular community in Cyprus:

A similar situation exists in Greece with whom Cyprus has long ... close historical, political and cultural links (same language, same religion, same customs, same sense of origin). For the last two centuries, Greek Cypriot education has followed the structure, curricula and syllabi of Greek schools, and textbooks have been sent free of charge by the Greek government. The tendency towards identifying the Cyprus education with that of Greece became the target of political and even armed struggle. The predominant role of the nationalist educational culture based on 'Greek learning', 'history' and the 'true and genuine dogmas of the Church' was boosted even more. Traditional educational culture has been internalised and historical continuity of the people of Cyprus .... Both in Cyprus and in Greece knowledge is conceived in direct relation to the syllabus .... (emphasis added)

While an important step, what counts as 'Cyprus' is not consistent throughout the paper, which still sometimes equates Greek Cypriots with Cypriots, RoC education with Cyprus education, and the RoC with Cyprus.

## **The EU and Pressures for Change**

One innovation emphasized as necessary for producing improvement is the integration of technology into classroom teaching to ensure a pedagogical shift in teaching and learning. Educational policy has stressed the importance of teaching technology as a separate

mandatory subject in the primary and secondary curriculum and the need to increase the number of computers available in schools (The Ministry of Education and Culture RoC, 2001). Today Cyprus is reported being among the few member states of the European Union where technology is a separate mandatory subject on its own in the primary curriculum and access to the Internet is reported as a reality in all schools (European Commission, 2004; The Ministry of Education and Culture RoC, 2001). Despite these structural changes and the increase in the availability of technology in schools, research stresses lack of progress in technology integration into teaching and learning due to the failure to achieve pedagogical change (Vrasidas & Mclsaac, 2001). Researchers argue that progress is unlikely unless the importance of in-service teacher training is realised and emphasised and policies and procedures are established to facilitate the growth and promotion of technology through higher education institutions (Vrasidas, 2002; Vrasidas & Mclsaac, 2001).

Concerns around the effectiveness of school leadership are also not uncommon. Studies conclude that Cypriot administrators are not improvement-oriented, do not prefer effective innovative decision-making procedures, and are viewed as lacking in essential personnel management skills (Pashiardis & Orphanou, 1999). Administrators are portrayed as being in need of training in such skills as strategic planning, ways of integrating special needs students into mainstream classrooms, curriculum management and renewal skills, and parent and community involvement (Pashiardis, 1997). Pre-service teachers are reported as having a more negative outlook than in-service teachers on the effectiveness of school leadership (Menon & Christou, 2002). One of the main reason suggested for the failure to change and improve is policy makers' and reformers' failure to fully comprehend the complexities of educational change and the obstacles that act against improvement efforts (Angelides & Leigh, 2004). For example, one qualitative study on the impact of teachers' beliefs on attitudes to teaching and learning stresses complexities that have the potential to negatively affect improvement and change efforts (Angelides, 2004). The bureaucratic,



hierarchic and centralized Cypriot education system, with total control of educational matters, is viewed as one of the main obstacles to change and improvement. Calls for a more democratic system are growing (Pashiardis, 2004; Pashiardis & Orphanou, 1999).

Recent articles and national evaluation reports depict the unitary Cypriot educational scene characterised by numerous improvement-oriented initiatives. These are supported by technical and financial co-operation between the European Union and Cyprus, where integration to the European Union and societal changes (such as becoming more multicultural) act as catalyst for change. This construction presents the singular Cypriot education system in need of improvement and change to fit into a European educational arena characterized by heterogeneous educational systems bound together by common traits. Strategic plans for the advancement of the Cypriot educational system are suggested (Tsiakkios & Pashiardis, 2002), and national evaluation reports on the implementation of the Socrates Programme in Cyprus and on the Bologna Process emphasise initiatives to harmonise the education system with the European education arena (Makrides & Christodoulides, 2003; Pneumaticos, 2005).

Reforms, strategies and educational policies within the European Union are not the products of nations working in isolation, but are influenced by European networking, co-operation, communication, and support, and are thus co-constructed within a European 'educational space'. In the EU, network proximity replaces territorial proximity (Lawn, 2002; Lawn & Lingard, 2002; Lawn & Novoa, 2002). Within this framework, reforms taking place in Cyprus are represented as influenced by the European educational space. But again, this representation applies only to the RoC, a member state of the European Union. It appears in the articles sampled to have no bearing on residents of the TRNC, who cannot participate in and benefit from the European educational space as yet due to the unrecognised status of the TRNC.

Papanastasiou and Koutselini (2003) address the EU educational framework, stressing concepts of democracy and human rights in the educational context as a whole, within which democracy and human rights are included in the aims of public education, active participation of students in the teaching and learning process are encouraged through curriculum, and students are taught to respect human rights. In contrast to this representation, empirical research suggests that a widespread commitment to and practices of multiculturalism in Cyprus lag behind other member states of the European Union. Schools still operate within a monocultural framework although they and the society they serve are rapidly becoming multicultural (Angelides et al., 2003). This research might be read as implicitly suggesting that there needs to be more recognition within the RoC of the existence of the TRNC and Turkish Cypriots: a closer look at the scope of the research, however, makes it clear that the paper really only considers the RoC. Similarly, little improvement is reported on inclusive education. Inclusion is portrayed as being far from the reality in Cypriot schools despite major policies of inclusion passed in recent years and an increased concern about inclusion arising from the membership of Cyprus in the European Union (Angelides et al., 2004). It is argued that legislative change still exclude those in need of special education and procedures for those in need, while speaking the language of inclusion (Symeonidou, 2002). All these findings focus entirely on the RoC, without specifying their scope as such.

There is particular irony in research examining questions of equity, inclusion, culture, democracy and human rights maintaining a focus on homogenised Cyprus represented by the south and excluding the TRNC and its own education system.

## **Creating a More Holistic Knowledgebase**

My search did reveal some articles and conference proceedings on the TRNC. Drawing on material from her teaching experience in North Cyprus, Turner (2001) offers a

participant-observer ethnography of an upper-level university class. An empirical study on return to education in the TRNC by Beton and Ertek (1997) found that levels of experience and education have positive effects on income. They used a literature base which included studies from the RoC and from Turkey, and concluded that their findings support those carried out in RoC and in Turkey. I also found articles on: the relationship between cognitive styles and learning preferences of undergraduate business students (Tanova, 2003); high-stakes testing and mathematics performance (Cankoy & Tut, 2005); the role of English in the TRNC school system (Drury, 1995); and the economic impact of the universities on the economy (Bicak, 1996). Small in number, these studies do not lead to the construction of common themes. For them to make such contribution it is imperative that more studies are carried out on education in the TRNC.

The vast majority of studies situate their empirical findings and theoretical arguments within the context of the RoC. They are based on inquiries with students and teachers in Greek Cypriot schools and higher education institutions, and they present findings that speak to the community living there. There is no difficulty with this per se. The problem is that, as I have demonstrated, although the focus is on education in the ROC for Greek Cypriots, they do not specify that their scope is thus limited. Through this omission they give the impression that they speak about education on the entire island. Representations reduce education on the island to the one in the RoC and mistakenly equate Cypriots with Greek Cypriots. They also deny the historic separation of education on the island, and project a homogenised scenario that leads to misleading constructions of education in Cyprus. Doing so, they contribute to the construction of an imagined Cypriot education system that is not recognisable to Turkish Cypriots.

To redress the balance two moves are essential. First of all, research on the education system in the RoC must recognise its scope and its limitations. Secondly, research on the education system in the TRNC is essential to complete the picture, and to build a

knowledgebase more representative of the entire island. Finally, we must explore the issues facing the invisible education system in the real Cyprus. Such a knowledge base would be recognisable to Cypriots living in the RoC and the TRNC. This dissertation, and the conference presentations and articles it informed, is an attempt to lead the second move with particular focus on recent educational reform initiatives in the TRNC within its socio-political context. As such, it derives its importance from its desire and attempt to give voice to voiceless and create a medium through which emerge a crafted presence in which the Turkish Cypriot community takes place and can imagine themselves as part of this constructed community.

## **Focus of the Study and Outline of the Thesis**

### **Focus of the Study and the Research Questions**

This dissertation frames education reform as a 'glocal' response to complex global pressure 'churns' faced by schools asked to do ever more in increasingly complex contexts. It is now possible to observe a common policy language around the globe. This meta-discourse prescribes systemic reform for the core of schooling, with substantive emphasis placed on accountability and capacity-building, in order to promote greater capacity in the system (Barber & Fullan, 2005; Fullan et al., 2001; Hopkins, 2007). Predictably, school improvement, and pedagogical and organisational capacity building, rely on local implementation of initiatives to determine whether the change is surface or deep (Fullan, 2000b, 2001; Hopkins & Levin, 2000).

This discourse has acknowledged the key role of the head teacher in improving organisational conditions to encourage and support pedagogical development and distributed leadership. It is surprising that despite this emphasis on the importance of effective leadership, little interest was shown in school leadership preparation and

development in many countries before the last decade (Brundrett & Crawford, 2008). Recently, leadership development has appeared on the radar of many education systems around the world; leadership is now regarded as fundamental for sustainable improvement in education systems (Gkolia & Brundrett, 2008).

On the other hand, while trends point towards policy convergence, more recently there has been growing interest in demonstrating the continued effects of context (Lingard, 2000a; Ozga, 2005; Ozga & Jones, 2006). Increasing numbers of scholars argue that the nation state struggles to (re)produce itself in the face of deterritorialising flows resulting in globalised practices with simultaneously co-present universalising and particularising tendencies (Appadurai, 1996; Robertson, 1995). According to this approach, to which this dissertation ascribes, understanding policy now requires analysis of national policy in context and international rhetoric decoding (Green, 2002). Successful education reform requires a thorough understanding of local challenges, cultures, and histories along with critical engagement with international reform packages and research agendas (Holmes & Crossley, 2004).

This study examines the recent reform initiatives undertaken to enhance teaching and learning in the TRNC with particular emphasis on the role head teachers play within the Turkish Cypriot education system and the existing professional development opportunities to support them. It also questions how headship could be recultured and restructured so that head teachers could lead instructional development and organisational improvement, how the system capacity could be enhanced to support them in undertaking this role effectively, and how head teachers could be supported in building their capacity to do so through systematic professional development. It addresses the following questions:

- In what local context was the TRNC reform agenda introduced?
- What was the profile of head teachers, what role were they playing, and how was

their capacity developed in the context in which the reform agenda was introduced?

- What were the objectives of the reform agenda; what form did it take and why?
- How could headship be restructured and recultured for the reform agenda to be realised?
- How could the professional development opportunities for head teachers be improved along with the external infrastructure to build leadership capacity and provide a context in which enhanced leadership capacity can be realised?

I had not refined the focus to educational leadership by head teachers and its links to educational reform when I first decided to look at educational reform in TRNC. Instead, my focus was exclusively on educational reform – how the reform was initiated, by whom, when, in what socio-economic context, and what was the strategy employed. Early during fieldwork, a number of local challenges that any educational reform initiative needs to address were identified. One of these was the capacity problem in the country, which includes leadership capacity in schools. When I discussed the leadership capacity with policy officers who were leading the reform, I was informed that it would be very useful for the planners if I were to focus on leadership capacity building with a specific focus on developing leadership by head teachers so that sustainable educational reform could have a chance. The focus of the study was then refined to address a local need – developing leadership capacity by head teachers to support sustainable educational reform.

## **Organisation of the Thesis**

This thesis is organised into a number of chapters and sub-sections. In this chapter I have explained how I came to carry out this research study, why I have done so, and what it has given me in return. It is in this chapter where I also demonstrated with evidence, from

a systematic review of the representation of the education system in Cyprus in scholarly literature, the contribution this study seeks to make to the existing knowledgebase on Cypriot education and to the reform initiatives in the TRNC.

The next chapter reviews some of the reasons behind education reform, which is increasingly evident all over the globe, in its attempts to address these pressure 'churns' that transcend national boundaries. It examines the complex interrelationship between the global and the local. It argues that the international policy discourse and common policy language, 'travelling' policies and reform strategies, are recontextualised in policy fields as they are translated into national contexts, due to the inevitable influence of contextual peculiarities in any given country on global policies and strategies. Consequently, different practices are produced. I demonstrate this 'translation' using the English and Finnish reform packages as exemplars. My intention in so doing is to draw attention to the importance of understanding local challenges, cultures, policies, practices and histories that set the scene, and of critically engaging with international policies rather than borrowing what is fashionable in other contexts.

Chapter 3 contextualises this study. It works with historical constructs and recent developments in Cyprus to portray the practical realities on the island and the socio-political developments in the TRNC particularly, which represents a case of 'vernacular globalisation'. It locates the Turkish Cypriot education system and the recent reform initiatives within this changing socio-political context and the emerging global education policy. It also reports the findings on the local challenges policy makers need to address to make the reform initiatives succeed. It suggests that the problems of public sector failure must be addressed while systemic capacity is built. It argues that demographic dilemmas must be identified and dealt with, vexatious questions around national identity must be debated, and a rigorous professional development strategy for teachers and head teachers must be employed. The chapter concludes that failure to address any of these

will cause the hopes and aspirations of the new government and its supporters, and the ambitious educational reform programme, to founder. Doing so, it sets the scene for a more in-depth investigation of one of the challenges policy makers need to address – building the capacity of the head teachers to lead pedagogical development and organisational improvement and the systemic capacity to pressure and support them to undertake this role effectively.

This is followed by the methodology chapter, which sets out the methodology employed to explore the research questions this study sets out to answer. It is a reflexive account of how I did this research, which acknowledges the complexities, challenges and dilemmas I faced during the research process as well as the practical issues of data collection relating to participant selection and the means of negotiating and obtaining access to participants and research sites. It is in this chapter where I also explain how my co-constructed identity, shaped and reshaped within the research fields, influenced data collection, analysis and presentation.

Chapter 5 presents my examination of the professional profiles of head teachers, with particular emphasis on what the role entails as well as the professional development of head teachers. My research indicates that the role of headship in the TRNC is largely operational and bureaucratic rather than strategic and instructional. Fundraising and bureaucratic communication take most of head teachers' time. Head teachers very rarely demonstrate instructional leadership and operate within a policy environment with no focus on teaching and learning and school improvement. This sets the scene for Chapter 6, which summarises the main findings and makes suggestions as to how this system can be improved. It suggests that headship needs to be restructured and recultured to ensure that head teachers are released from operational and bureaucratic burdens to focus on organisational renewal and instructional improvement. Their capacity to carry out their new role effectively needs to be enhanced through high-quality professional development.



**Chapter 7 concludes this thesis. It discusses the originality of the study, its limitations and its impact on my persona, and plans for dissemination of findings and further research.**

# **Chapter 2**

## **Literature Review**

### **Introduction**

This chapter considers the question of educational reform and how it has been realised in different contexts. I start with an outline of three interconnected pressures for change to which large-scale education reform has been viewed as the answer across the globe, particularly over the last two decades. This increasing focus on reforming education has resulted in a common policy language and 'travelling' reform strategies. I argue that, even in the presence of this common policy language underlying national policy texts, the 'travelling' international policies are recontextualised in national policy fields and institutional fields. I then use the English and Finnish policy solutions to demonstrate that 'travelling' reform strategies and policies are re-created in contexts of practice and eventually result in different practices.

### **Pressing Arguments for Reform**

#### **Educating Children and Young People for the Knowledge Economy**

A term rarely voiced in everyday language and academic circles until late 1980s, 'globalisation' is now intensively discussed in many countries (Giddens, 2002). Globalization has brought far-reaching changes to financial markets, to economic activities through which transnational capital flows and multinationals operate across nation states, and to electronic communication and media (Ozga & Jones, 2006).

Positional consensus theory claims that changes in financial markets, communication, and information technologies have changed the means of production to a system where production and application of new knowledge is the primary channel through which nation

states achieve global economic advantage and where knowledge and skills are primary requirements to achieve competitive advantage (Kenway et al., 2004; Ozga & Jones, 2006). According to the positional conflict theorists, the basic economic resource in knowledge economies is knowledge that is flexible, ever-changing and ever-expanding rather than capital, labour or natural resources. In this economy, profitability depends on the corporate ability to generate and process knowledge to invent products and services faster than their rival corporations to meet the demands of capricious consumer choice and rapidly changing expectations (Hargreaves, 2003).

Continuous production and application of new knowledge is thus the primary channel through which corporate organisations and nation states achieve global market advantage. As Boyd (2000: 229) notes, "global economic trends have brought worldwide economic competition and moved developed nations from 'smoke-stack' to 'high-tech' industries requiring a workforce with greater intellectual and problem-solving skills." Therefore, the more technologically advanced societies become, the greater their demand for 'knowledge workers'; the more organisations are skilled in enhancing continuous innovation in products and services by maximising the access to knowledge and the workers' ability to generate and apply new ideas, the better prospect of survival they have (Senge, 1990). This depends primarily on having a sophisticated information and technological infrastructure that makes knowledge generation, processing and circulation faster and easier (Hargreaves, 2003). This is a truism for less developed countries as it is for leading economies (Castells, 1996).

This new economy has had unprecedented impact also on the labour landscape. Semi-skilled and unskilled work has largely been replaced by new jobs that demand much higher skills and education in many post-industrialised countries (Thomson, 2007). The positional consensus theorists argue that entry into the knowledge-driven economy and the ability to thrive in it depends on the ability of the individuals to acquire the knowledge

and the skills employers need. Such changes in the knowledge-driven labour landscape have pushed education to centre stage, putting a new onus on schools to prepare not a relatively small elite, but all children and young people to enter this new landscape, benefit from it, and contribute to it. The main aim of education here is to improve economic productivity and national competitiveness by improving the 'quality' of labour. The rapid expansion of higher education and greater investment in tertiary education particularly in post-industrialised countries reflect this increasing need to supply the 'knowledge workers' in demand in the knowledge economy (Brown 2003). Ozga and Jones (2006) underline that the knowledge economy thesis drives education policy across the globe, with international organisations such as the OECD and the World Bank stressing that education and training are critical requirements for participation and success in the knowledge economy (OECD, 1996).

## **Educating Children and Young People against the Knowledge Society**

An alternative explanation is offered by the conflict theory of employability. This approach defines employability as two dimensional – absolute and relative – and underlines that one's ability to succeed in this new economic competition is relative to others (Brown et al, 2003; Brown 2003). Contrary to the consensus theory, this approach denies that demand for high skills is a global feature, and emphasizes the unequal distribution of resources, polarisation of skills, and the subjective dimension of employability (Aronowitz & DeFazio, 1994). For the conflict theorists, positional conflict has been intensified and socio-economic background plays a crucial role in the job prospects of those from disadvantaged backgrounds (Devine, 1999).

The intensified 'positional' conflict that further widens the opportunity gap and intensifies the opportunity trap stands in stark contrast to the employability policies based on the principle that economic welfare of individuals and competitive advantage of nation states

depend primarily on knowledge and skills (Brown, 2000; Brown, 2003; Thomson, 2002). As some of the wealthiest post-industrial countries are increasingly characterised by pockets of well-paying knowledge work existing alongside large-sweats of low-waged, low-skilled jobs, the competition for scarce high-skilled knowledge work has increased (Brown, 2006; Brown et al., 2001; Hargreaves, 2003). Success more than ever depends on access to tough-entry schools, universities and jobs. This further increases social inequalities and 'positional' conflict. The knowledge society is thus also one which brings high social risks and side-effects too significant to be overlooked (Hargreaves, 2003). Increasing polarisation, segregation and special concentration, where the rich and poor live increasingly further apart, is a global phenomenon that trails around and through some of the wealthiest post-industrial countries (Pacione, 1997; Thomson, 2002). Thomson (2007: 30) underlines "the privileged [who] become global knowledge workers, and seek to isolate themselves in gated communities, cities polarise and the poor are increasingly isolated in specific neighbourhoods".

While there has been a reduction of poverty among the aged, many wealthy nation-states have witnessed re-emergence of child poverty of varying degrees of intensity in the last decades (Bradbury & Jäntti, 1999; UNICEF, 2005). Compared with others elsewhere in the OECD, the situation of children has deteriorated particularly in English-speaking countries with the United Kingdom and the United States having the highest relative child poverty rates among the wealthiest countries (Micklewright, 2003; UNICEF, 2007). In the past generation, child poverty has grown faster than overall income inequality and the proportion of children living in poor families has doubled in the UK (Hirsch, 2006) with income inequality and child poverty rising at the same time as the intergenerational mobility has declined.

The high-risk, high-segregation, high-exclusion society is also one of escalating danger. The widening gaps between the poor and the rich fuel crime and mounting insecurity by

creating anger among the excluded and insecurities among the excluding privileged (Hargreaves, 2003). Gun crime has risen sharply in disadvantaged areas and shocking truth warns of a generation of children as young as 12 who risk being immersed in gang culture and kill for mundane reasons. If these negative unintended side-effects of the knowledge society are to be avoided, schools should not and cannot be directed only towards the ends of the knowledge economy, but should strive also to serve the public good.

Recent national education agendas have been criticized for being driven primarily by economic competitiveness while sidelining, other than in rhetoric, these social purposes of education (Ball, 2008; Wrigley, 2008). As Blackmore warns, "Education is ... not only about cognitive learning but also about developing a range of social and interpersonal capacities, including a sense of rights and responsibilities, the building of trust, identity and citizenship formation." This harnesses a specific and prime role for education: to construct and sustain the global knowledge society by leading economic and social change to build the intellectual and social capital to benefit from the new economy while working against it (Hargreaves, 2003).

## Equity

Poverty and disadvantage are exacerbated by increasing educational inequality (Blanden et al., 2005; Hirsch, 2007; Pech & McCoull, 1998) and 'positional' conflict (Brown, 2006). There is general agreement that the context of disadvantage has a strong impact on school life (Horgan, 2007; Lupton, 2004, 2005; P. Thomson, 2002; Thrupp, 1999; Wheeler et al., 2005) and the production of educational advantage and disadvantage (Thomson, 2007). The relationship between poverty and education is a vicious circle. It is now recognised that children from low-income households generally attend schools situated in high-poverty neighbourhoods, and that there is a strong link between the deprivation of

the area and the 'quality' of schools. Compared with schools serving more affluent areas, schools serving high-poverty neighbourhoods:

- perform less well and achieve low academic attainment (Gallagher, 2006; Horgan, 2007; Lupton, 2003);
- spend more time on welfare issues and discipline, since engaging children and parents, and planning and financing extra-curricular activities, are more challenging (Thrupp, 1999; Thomson, 2002);
- have fewer teachers and less adults with degree-level qualifications in comparison to schools serving more affluent areas with high proportion of qualified young people (Wheeler *et al.*, 2005);
- offer school experiences to children which are powerfully influenced by the level of disadvantage they face; children from disadvantaged areas accept that their social position will be reflected in how they experience school (Horgan, 2007).

Poverty is not the only factor that produces under-achievement. Race and ethnicity seem to be important too. Recent decades have also seen marked changes in population growth and household patterns. Due to the ease of communication and the growing globalisation of trade and business, increasing international migration is also a growing global phenomenon. From the 1980s, the influence of net migration growth in developed countries has risen at the same time as the impact of natural change has declined. In the UK, net migration has accounted for 66 per cent of population change between 2001 and 2005, with a pattern of increasing net in-migration of foreign citizens and out-migration of British citizens (Office for National Statistics, 2007).

High-poverty urban neighbourhoods are known to attract disproportionate levels of immigrants, refugees and guest workers. This ethnoscape (Appadurai, 1996) or global flow of people, adumbrates a set of challenges for education and social policy. Evidence

from the UK suggests that it has a detrimental effect on some schools, which experience increased numbers of pupils whose first language is not English, with rates rising to 50 per cent in some inner city schools (Institute of Community Cohesion, 2007). This special concentration of international migrants in inner cities and pupils with English as an Additional Language in inner city schools is another cause for concern. Among the pressure 'churns' in schools are pupils with varying degrees of English, increasing linguistic and cultural diversity, mid-term arrivals, and complex special needs and issues of attendance (Institute of Community Cohesion, 2007). These challenges harness a different prime role for education: to close the gap between children from low-income families and children from affluent households; and to tackle under-achievement caused by ethnicity and race while at the same time raising the bar.

## **The Global Picture: Educational Reform**

Nation states face particular stresses that arise from the new economy, the need to maintain competitive advantage, and the unfavourable social trends and deepening inequalities associated with globalisation and the new economy (Ozga, 2005). These changes in the macro-political and macro-social contexts shape local experiences around the world and create tensions in the ways in which stakeholders measure the effectiveness of education and pursue educational change. Some claim a 'new consensus' on educational principles, within which concepts such as the learning society and knowledge economy are strong policy condensates that transcend national boundaries (Ball, 1998; European Commission, 1995) .

Within this trajectory, education is viewed as an instrument for economic and social change through which economic growth is stimulated, greater social cohesion is achieved (Hudson, 2002, 2007; J. Ozga & Jones, 2006) and underperformance in education is not tolerated but rather fixed. Various nation states have attempted not simply to initiate but



also to sustain reform on a large-scale (Fullan, 2000) (Levin, 1998), only to arrive at the conclusion that change is slow, difficult to scale, and even more difficult to sustain (Datnow et al., 2002; Hargreaves & Goodson, 2006; Thomson et al., 2009). Hargreaves and Fink (2006: 1) assert that “change in education is easy to propose, hard to implement, and extraordinarily difficult to sustain”.

We can now observe patterns of national response to these global challenges: an international policy discourse and a common policy language underlying the national texts (Arnott & Menter, 2007; Ball, 2003; Ball, 1998; Ball, 2001; Bottani, 2000; Green, 2002; Hudson, 2007; Levin, 1998; Ozga, 2005). This is the result of the increased potential for policy borrowing due to advances in technology and globalisation. There are, however, significant variations in the global policy language in various local contexts (Bottani, 2000; Green et al., 1999), leading to ‘glocalised’ responses, which I discuss more fully later in this chapter. But, I first embark on a brief discussion of policies and reform strategies that travel to distant lands. It is not possible to explore here all the policies that have been emphasised in many reform ‘packages’ internationally; three that seem to have major effects universally will be analysed. These are decentralisation, accountability, and school leadership.

## **Travelling Tales: Policy Convergence**

A widespread discourse common to school systems in many countries is the promotion of large-scale education reform through changes in governance, with greater emphasis on performativity realised in increased emphasis on standards, accountability and monitoring (Levin, 1998; Priestley, 2002). The general trend in OECD countries has been away from direct government control and towards greater decentralisation of management responsibility to local communities and schools, which is now largely used as a tool to improve the quality of education (Bottani, 2000; Eurydice, 2007; Levin, 1998; Priestley, 2002). These initiatives were based on such early change literature as Caldwell's concept

of self-managing schools, which presents schools as capable of fully self-managing and solving their problems on their own (Caldwell, 1994; Caldwell & Spinks, 1988). It is assumed that when taken at the level closest to local needs and contextual realities, decisions will increase the effectiveness of decision making, and allow better use of public resources and will raise standards (Levin, 1998). Ironically, 'autonomy' designed to increase school's decision-making powers is often a top-down policy not demanded by schools, but rather imposed on them.

[S]ince the 1980s in Europe, these [decentralizing] reforms are largely laid down under national legal frameworks which demonstrate a top-down model of decision-making process without any identifiable driving force coming from schools themselves ... Schools themselves did not seek autonomy, the legislation made provision for the transfer of new duties without schools having any right to express their view on the matter. In fact, schools acquired new responsibilities in spite of their own wishes. (Eurydice, 2007: 14)

School choice is an extension of decentralisation policies, sometimes accompanied by information on school 'performance' (Maroy, 2009). School choice makes schooling a market commodity, where schools compete with one another for public resources (Levin, 1998). Despite autonomy and choice, little attention is paid to increasing the diversity of educational options in many contexts; instead, standardisation policies such as the national curriculum and standards-based teacher and leader preparation and professional development have led to the erosion of such diversity. "[T]he same time as governments have been making moves to increase parent and student choice, they have also been taking steps that may result in schools being more similar and the choice therefore being less meaningful" (Levin, 1998: 133). These moves towards greater local autonomy have been undercut by marketisation and the virtues of quasi-markets (Ball, 2001; Priestley, 2002; Ranson, 2008).

A second trend concerns the struggles of central governments to recentralise control over education systems (Priestley, 2002). It is generally accepted across the globe that a corollary of 'autonomy' has been the policy of 'accountability' (Ball, 2001; Maroy, 2009; Sugrue & Mertkan-Ozunlu, 2009). Through these twin towers of 'autonomy' and 'accountability', new forms of control are established that make it possible for the state to 'steer at a distance' through standards, targets, objectives, and evaluation (Ball, 2003; Bottery, 2007; Day, 2003; Green, 2002; Green et al., 1999; Gronn, 2003; Hudson, 2007; Karlsen, 2000; Smyth, 1993; Thomas & Levacic, 1991; Whitty, 2008). Typically, governments set the standards, targets, and objectives, leaving schools limited discretion with regard to the nature of their achievements, and more discretion in how to achieve these objectives, while governments measure school performance against the targets, and distribute rewards and sanctions in proportion to success. The organising principle of these policies is 'performativity', which is a corollary of 'marketisation'.

An extension of the twin towers of 'autonomy' and 'accountability', of 'marketisation' and 'performativity,' is the issue of leadership. Heroic leadership has been increasingly questioned (Gronn, 2009; Harris et al., 2007; Sugrue, 2009), and distributed leadership has been promoted as the way forward (Fullan et al., 2001; Hargreaves & Fink, 2006; Hargreaves & Goodson, 2006; Thomson & Blackmore, 2006). Consequently various layers of management have been created, such as middle management and senior leadership. It has been argued that this approach does not reduce the importance of head teachers. On the contrary, the key role of head teachers in school effectiveness and improvement is well documented (Barth, 2006; Day et al., 2000; Day et al., 2008; Hord & Sommers, 2008; Leithwood & Jantzi, 1990; McLaughlin & Hyle, 2001) although the influence of head teachers is contested by some scholars (Searle & Tymms, 2007). Leadership preparation and professional development of school leaders are important in this framework and there is increasingly intensive policy activity across the globe to develop the capacities of aspiring and practicing head teachers (Cowie, 2008). This is

another trend across the globe, which has “suddenly and in some ways quite dramatically, become a major focus of educational systems” (Brundrett & Crawford, 2008: 1). Hallinger (2003: 4) claims that “today school leadership development has become a global enterprise”.

This renewed global emphasis on leadership training and development can be seen as the fulfilment of the need for systemic training and development of school leaders and of the affirmation that school leaders are a key factor in school improvement and effectiveness (Fullan, 2005; Harris & Lambert, 2003; Hopkins & Jackson, 2003). It is also promoted as a solution to the growing evidence of the shortage of applicants for leadership positions, in particular for headship, and a response to the heightened concerns that education sector is facing a potential leadership crisis (Howson, 2007; Rhodes & Brundrett, 2006; Stevens et al., 2005). Nevertheless, there is a cogent critique that the school leadership shortages, increasingly an international phenomenon (Gronn & Lacey, 2004), are the unintended consequences of the increasing complexity of schooling and the multi-faceted role of leading schools (Bristow et al., 2007; Glatter & Harvey, 2006; Gronn, 2003; Thomson, 2008; Thomson, 2009b). Critics argue that the answer to the leadership shortages does not lie in thinking about how school systems can widen the pool of aspirant leaders and develop them, but in how leadership positions could be redesigned to build more positive perceptions of the role and to make it more attractive (PricewaterhouseCoopers, 2007; Thomson & Blackmore, 2006).

Although the general direction of change in most cases has been the same – i.e. towards marketisation, performativity and managerialism – significant differences exist between systems, causing policy divergence as well as policy convergence. The flow and influence of global policies is not simple and needs to be addressed with care for two reasons. First, globalisation influences different nations at various scales at various times (Lingard & Rizvi, 2000). Therefore, the structures and influences of globalisation are relative and

relational rather than absolute. Second, globalisation does not destroy local contexts, but invades them in different manners in different contexts. The new cultures and structures that result from these global processes are influenced by the struggles of the nation state to (re)produce itself in the face of deterritorialising flows. This is what Robertson (1995) calls 'glocalisation' whereby both universalising and particularising tendencies are simultaneously co-present, or what Appadurai (1996) means by 'vernacular globalisation', which I now move on to discuss.

### **'Glocalisation': Policy Convergence Revisited**

Today there is increased potential for policy 'borrowing' due to advances in technology and globalisation, coupled with enhanced dangers from uncritical international education policy transfer (Crossley, 1999, 2001). It has been increasingly recognised that it is vital to understand and respect local challenges, cultures, policies, practices and histories that set the context in which policy makers, school leaders, and teachers operate (Crossley, 1999; Crossley & Holmes, 2001; Holmes & Crossley, 2004; Khamis & Sammons, 2007). Warning that context is too powerful to be overlooked, critics underline that it is imperative to adapt international policies and models to local contexts (Gershberg et al., 2008; Hardman et al., 2008; Penny et al., 2008). Holmes and Crossley (2004) have also reiterated, based on their evaluations in the Saint Lucian context, that *critical* engagement with international research agendas is the key to success.

Although the globalization of research and development knowledge is taking place, it has been demonstrated that Saint Lucians are effectively reconceptualizing their own approaches to educational research in such ways that enable greater self-assertion and critical engagement with international agendas. This, we suggest, holds improved potential for the formulation of globally aware, but locally relevant education policies. (2004: 211)

These research findings all highlight that locale-specific challenges and dilemmas require locale-specific improvement agendas informed by locale-specific research as well as international research and policy developments, not improvement models based on uncritical transfer of what is fashionable in contexts that dominate educational research. The relationship between 'travelling' international policies and national reforms is a complex one. These policies and reform strategies are recontextualised in policy fields (Bernstein, 1996) when being translated into national contexts, but also in institutional fields when being implemented in school contexts, both of which inevitably impose local modifications, changing reforms as they are changed by them (Datnow et al., 2002). Webb et al., (2006: 409) draw attention to this double-layer of local mediation,

Research on the policy-practice interface within a country shows the manner in which policies are variously interpreted, mediated, adapted, disregarded or even resisted in schools and classrooms as a result of the different innovation biographies of each school ... and the beliefs, preferred practices and understandings of individual teachers .... Globalization has provided another layer of cultural mediation of policy implementation, whereby global policies are themselves subject to the same processes both at national policy-making level and in schools.

Similarly, Ball (1998: 126) contends that

National policy making is inevitably a process of bricolage: a matter of borrowing and copying bits and pieces of ideas from elsewhere, drawing upon and amending locally tried and tested approaches, cannibalizing theories, research, trends and fashions and not infrequently flailing around for anything at all that looks as though it might work. Most policies are ramshackle, compromise, hit and miss affairs that are reworked, tinkered with, nuanced and inflected through

complex processes of influence, text production, dissemination and ultimately, re-creation in contexts of practice.

It is through this lens that I now critically examine two different versions of education reform, bringing together a selection of 'travelling' policies and reform strategies: from England and Finland. I am concerned with local reform packages that seem to implement 'travelling' policies and strategies with varying intensity, hybridity and creativity in different locales. These strategies and policies are complex and complexly-interrelated, and translate into national contexts in complex ways. My intention in so doing is to illustrate that 'travelling' reform strategies and policies do not translate into practice in pristine form, but are re-created in contexts of practice (Ball, 1998), because contextual peculiarities of a particular country inevitably influence 'travelling' policies and reform strategies and produce different practices with varying consequences. The dominant school reform, improvement, and effectiveness literature has largely concluded that there are a set of change strategies that must be in place for reform to be successful regardless of contextual differences. These literatures largely fail to consider the nuances among these strategies or whether they are applicable to the reform context. By zooming in on divergence as well as convergence and on recontextualisation, I also aim to demonstrate that this approach is simplistic.

It is also my intention to demonstrate the debates about the selected reform packages and their unintended consequences to underline the lessons learnt along the way. This is why, while discussing them, I subsequently progress to decode the international discourse and unpack various critiques of the reform strategies these packages bring together. Green (2002: 612) suggests that "to understand policy now, one has both to decode the international rhetoric and analyse policy in context to appreciate dynamics of change". This is a complex task. To do so, I draw on many sources including writings about large-scale educational reform, writings about school improvement, writings about

organisational change and writings about education policy.

The first Case Study refers to England and not to the UK. This distinction is important because with the impact of devolution policies, it is now the case that there are significant differences between England and the rest of the UK, in particular Scotland. I have chosen England because it is a classic case of the standards-based reform which has been dominant across the globe in the last two decades and is in fact a case where global 'travelling' policies such as parental choice, institutional competition, local management, and performativity exist in their purest and most intense forms (Ball, 1998). It is one of the cases most thoroughly researched in the last two decades and thus has much to offer to any discussion about large-scale education reform. I have chosen England for these reasons. Finland, on the other hand, is a country smaller in size (5.3 million in comparison to 60 million) and culturally less diverse than England. What both countries have in common is the fact that they both have changed radically. I have chosen Finland for two reasons. First and foremost, there are significant contextual differences between the two countries; thus Finland has more potential to shed light on how 'travelling' policies are re-created in local contexts than places such as New Zealand, or many US and Australian states. There are still local variations and nuances in these contexts as well, but these are less evident. Second, Finland is a country of increasing popularity among researchers interested in education reform due to its recent success in PISA and thus there is a decent size of literature on the Finnish education system and on the reform strategies used to transform it. The sections that follow are, however, still disproportionate. The section on the English strategy is more detailed and there is considerably more critique of it whereas the section on the Finnish strategy is less detailed, shorter, and there is less critique of it. This reflects the available literature on both contexts.



# **Educational Reform: Learning through Unmasking Appearances**

## **England**

The English education system has been radically transformed in the last two decades. The 1988 Education Reform Act had a phenomenal impact on the formation of the system known to us today. It made it possible to think about schools almost totally self-managing and acting like businesses within a quasi-market through endogenous privatisation by creating a 'decentralised' and diversified system of schooling based on competitive performativity and parental choice (Ball, 2008; Gordon & Whitty, 1997; S. Ranson, 2008; Whitty & Power, 2000). It also introduced privatisation as a solution to public problems by opening up the policy work to new service providers including business and made it possible to think about private sector participation in the public sector through exogenous privatisation (Ball, 2007; Ball, 2009; Fitz & Beers, 2002; Hatcher & Hirtt, 1999) while at the same time strengthened the central government's control over pedagogy through the introduction of a highly prescribed National Curriculum and monitoring of learning through centralised student assessment and national inspectorate (Thomas & Levacic, 1991; Whitty, 2008). The English reform strategy was committed to increasing standards through the principles of choice, performativity, and lately collaboration through networks, and workforce reform. Each strategy is discussed below.

### **Performance Driven School Choice**

A range of schools each with different degrees of self-governance were established to create a decentralised and diversified system of schooling (Ball, 1993; Riley, 1998). The 1988 Education Reform Act enabled schools to opt out of local authority control to become grant-maintained schools and decentralised managerial decision making to the governing body whose renewed responsibilities included employing and dismissing staff, and organising professional development programmes (Fitz et al., 1994) In the following

years, more schools were encouraged to opt out for grant maintained status and schools remaining under local authority control were given more control over managerial and budgetary matters under the Local Management of Schools agenda. Decentralisation was not accompanied with external support to build schools' capacity to manage themselves; rather, the initiative was based on early change literatures such as Caldwell's concept of self-managing school (Caldwell, 1994; Caldwell & Spinks, 1988), which presented schools as capable of fully self-managing and of solving their problems on their own.

With decentralisation also came the obligation for schools to attract their own students rather than rely on Local Authority determined student intake and the allocation of funds determined by the number of schools. Levacic and Hardman (1998) argue that the simple logic of financial initiatives based on student numbers is naïve and demonstrate that social disadvantage and LA variations influence schools' financial performance; West and Pennell (1997) show that schools' ability to improve examination results and thus, their popularity among parents are skewed by overtly or covertly selecting most able pupils or excluding socially disadvantaged pupils. In a policy environment where schools need to attract students themselves to be viable under open enrolment and the amount of money they receive depends on the number of students they can attract under the local management of schools formula, performativity puts schools in competition with one another for students (Whitty, 2008). These policies have created a policy environment where schools under local education control constantly compete with 'independent state schools' (Arnott & Menter, 2007) to raise standards, which increasingly became the gate keeper to more students and thus more funding. However, in reality, these sectors were not that different pedagogically with the national curriculum, which came to statutory force for all schools including grant maintained schools from 1988 and with decentralisation applying also to schools that have remained under the local authority. A system diverse at the level of governance, but similar in terms of modes of education was created (Fitz et al., 1997).

The English reform agenda based on this analysis has approached systemic change through standardising the curriculum, developing standards for school performance, teaching and learning to redress inequitable schooling by elimination variation among schools (Thomson, 2007), and through initiatives aimed at enhancing internal school capacity to turn themselves around without too seriously considering to improve the contextual factors affecting schools (Harris et al., 2006). This strategy largely explains inequitable schooling by variation in the quality and the content of education provision in the system.

This is just one explanation for failure and inequalities within the education system. Other explanations often given include a highly uniform schooling characterised by policy directed curriculum and teacher directed pedagogy with limited flexibility to offer diverse learning experiences, and to go beyond regurgitation of information for tests and also achieve social outcomes (Gonzales et al., 2005; Kress et al., 2005; Thomson, 2002; Thrupp, 1999). This latter analysis may suggest that an improvement strategy should do the reverse of what the reform agenda in England has set to do: to develop schools that do not follow the 'one size fits all' model and schooling that enables personalised curriculum tailored to the needs and interests of pupils (Burke & Grosvenor, 2004; Thomson, 2007). Additionally, research demonstrates that significant gains are achieved when parents' from disadvantaged communities are involved in their children's education (Carreon et al., 2005). This suggests that, in order to redress the failure of schools to close the gap while at the same time raise the bar, reform must create avenues for parents to contribute to their children's education, a strategy that has not been employed in England, where parents' role by and large has been confined to choosing schools their children go to or to contribute to school governance through a limited number of parent governors.

The processes of school choice have also been criticised for bleaching the context by associating educational failure solely with poor schooling and inequitable schooling with variation in the education system. Of particular importance was the policy tendency to downplay the links between social inequality and educational achievement (Angus, 1993; Thrupp, 1999; Thrupp, 2001), to expect schools in unfavourable conditions to compete with their counterparts in exceptional circumstances, and to keep schools responsible for quality variation within and among schools and expect them to tackle these variations themselves by working harder (Lupton, 2004). Doing so, they often fail to question social inequalities as socially constructed and to acknowledge that unfavourable conditions could be made better or worse through policies, which eventually impact on student achievement (Anyon, 1997). Harris et al. (2006), however, recently demonstrated that improvements in the external environment such as employment opportunities and new housing influence schools' ability to raise standards more than any internal changes. Brown et al. (2002: 11) underline,

To some extent, teachers have been handed an impossible task, being expected to be the miracle workers of modern society, an unrealistic expectation which ultimately results in guilt and strain when teachers and schools cannot deliver all that is demanded of them. It seems imperative that there should be a reassessment and redefinition of teachers' work and school responsibility ... Other members of the community must reassume responsibility for some of the expectations currently being shifted on to schools and teachers.

There are two obvious problems with the contextual reductionism of policy solutions (Wrigley, 2004): (a) contextual variables have an impact on school effectiveness so much so that systemic arrangements have a significant influence on what a school is capable to do (Bowe et al., 1992); and (b) these reform packages are unlikely to overcome social inequality. It goes uncontested that schools with high poverty levels are generally of a

lower quality than schools located in more affluent areas due to the contextual difficulties that are part and parcel of their everyday realities Lupton (2004, 2005). Policy solutions love generalities, as if all schools are the same and operate in similar contexts. With each school serving a discrete community in a distinct organisational culture and structure, which is the result of a particular history, this is certainly not the case (Thomson, 2007). Critics, thus, argue that these reform packages are unlikely to overcome the effects of social inequality and to improve the relative performance of schools in challenging circumstances against schools in more affluent areas and deliver the promise of 'failure-free schooling' (Thrupp, 2001; Whitty, 2008).

The New Right's concern with increasing standards through the principles of school choice and self-governance was accentuated by New Labour (Husbands, 2001; Ranson, 2003; Ranson, 2008; Thomson & Hall, 2008; Whitty, 2008). The amount of differentiation among schools has increased since the New Labour government took office in 1997. Schools were reclassified into foundation, voluntary and community schools by the Schools Standards and Framework Act (DfEE, 1998a), each with slightly different arrangements for school governance and different levels of organisational 'autonomy' (Goodwin & Parker, 2007). Albeit new titles of foundation and community schools were created, the distinction between grant-maintained schools and Local Authority maintained schools inherited from the Conservative government was kept (Ball, 1998; Ball, 1999). Additionally, the specialist schools programme, which was introduced in 1994, was maintained and expanded with schools increasingly encouraged to adopt the programme by initiatives such as the Partnership Fund.

The government continued to promote as a mantra the idea that diversity produces excellence when accompanied by choice through the establishment of Academies, first introduced in 2000 under the name of College by the Learning and Skills Act 2000 (*Learning and Skills Act*, 2000) as a type of school independent of LA control, overseen

and funded directly by the central government with external sponsorship from private sectors. This was followed by the introduction of Trust Schools in 2006 by the Learning and Skills Act 2006. The intention was that all Academies would improve through innovative approaches to governance, teaching and management. Critics of the Academy programme are numerous in academic circles, but there have also been instances when parents also vigorously campaigned against Academies (Hatcher & Jones, 2006). This new relationship with sponsors has led to concerns that sponsors are given the opportunity to shape the future workforce according to their business interests and needs through their exceptional involvement in school governance (Ball, 2007; Gunter, 2008; Hatcher, 2008; Titcombe, 2008) and that the public sector is being increasingly privatised through the extension of dual ownership of schools to private sectors (Ranson, 2008). In these circumstances, it could be argued that alleged 'autonomy' of these schools could be more fictional than real albeit more research is required to test this hypothesis. Another concern was that the Academy programme has not led to any apparent gain in terms of raising standards (Gillard, 2008; Gorard, 2005, 2009).

### **Focus on Standards through Performativity**

Increasing diversity has been accompanied by high pressure to raise educational standards (DfEE, 1997). This strategy has included a quasi-market based pressure structure of target-setting for schools, which came into statutory force from 1998 (DfEE, 1998b), a culture of performativity including ambitious standards for student attainment, performance management and publicisation of external performance measures of student attainment and school effectiveness through league tables and Ofsted inspection reports (Whitty, 2008). Within this culture of performativity, funding and increased autonomy were attached to high-performance and government intervention to low-performance. This was true not only for institutions, which as in the case of the academy programme might face closure and reopening, but also for teachers and head teachers.

Critics argue that these reform processes form a strategy through which new forms of control are established that makes it possible for the state to 'steer at a distance' (Ball, 2003; Bottery, 2007; Day, 2003; Gronn, 2003; Hudson, 2007; Karlsen, 2000; Smyth, 1993). This is what Karlsen (2000) calls 'decentralised centralisation'<sup>2</sup> under the policy rhetoric of decentralisation and enhanced autonomy. In this new form of governance, the state defines what children and young people learn, determines what counts as effective performance, and how performance is to be measured and using what indicators. The role of teachers and managers is minimised to deliver what is expected to demonstrate their 'worth'. With the introduction of tighter policy control of the system, there was a shift to government 'regulated autonomy' (Dale, 1989) through which centralised educational policy exercises control over the work of teachers and school leaders (Gleeson & Husbands, 2003; Storey, 2004; Woods et al., 1996).

The National Curriculum introduced in 1988 by the 1988 Education Reform Act was central to this agenda. It acts together with standardised student assessment: national testing informs parents about the 'winners' and the 'losers' of the game through the provision of school comparisons in public league tables and the National Curriculum makes school comparisons possible by standardising the content for all schools to teach while at the same time enables accounts of performance to be monitored by the national inspectorate (Hartley, 2008; Thomson & Hall, 2008). Ranson (2008: 206) underlines, "A sophisticated national system of regulations – the trappings of the audit state – was put in place to measure and monitor a limited set of performances and outcomes – principally, test and examination results".

By honouring measurable, quantifiable outcomes and by promoting statistical forms of evaluation, critics argue this national system reduces what children learn to basics,

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<sup>2</sup> Karlsen argues that decentralisation does not hand the power to schools, but decentralises managerial decision-making under greater central surveillance where regardless of the greater 'autonomy' decentralisation appears to offer to schools, the government retains overall strategic control by 'steering at a distance'.

downgrades the value of other outcomes and defines quality in a narrow way (Day, 2005; Slee et al., 1998; Thrupp, 2001; Wrigley, 2004). McNeil (2000: 733) argues that education systems with standards linked to high stakes decisions, “rule out the possibility of discussing student learning in terms of cognitive and intellectual development, in terms of growth, in terms of social awareness and social conscience, in terms of social and emotional development. It is as if the “whole child” has become a stick figure”. Thomson and Hall’s recent research (2008) demonstrates that the National Curriculum not only strips what is worth knowing to quantitatively measurable basics, but it also privileges a particular set of knowings and doings – its discourses and demands make it particularly difficult for teachers to take up the knowledge and experiences of children whose resources do not match what is required. Thus, it contributes to inequalities, which it promises to solve.

In the English reform package, external inspection serves an accountability purpose with a summative objective along with prescribed frameworks, targets, and indicators of success rather than an improvement purpose with a formative purpose (MacBeath, 2004, 2008). It was widely criticised by research findings suggesting that they impair the normal school day, could have detrimental effects on teaching effectiveness and school performance, and could divert energies from teaching to documentation, rehearsing in preparation for inspection, and could negatively affect teachers’ emotions (Brimblecombe & Ormston, 1995; Jeffrey & Woods, 1996, 1998; Jones et al., 1999; Lonsdale & Parsons, 1998; Rosenthal, 2001). Such reactions are not surprising in systems characterised by high-stakes consequences for the whole school, teachers and school leaders. In 2004, the British government announced ‘a new relationship’ between the national inspectorate and schools to be based on school improvement through school self-evaluation (DfES, 2005b). This move is exemplary of a larger trend. European systems along with those in Asia, Australia and North America have been striving to achieve a lasting marriage between external and internal forms of evaluation (MacBeath, 2008; MacBeath et al.,



2000).

This is easier said in theory than achieved in practice, particularly in contexts where schools lack the capacity to monitor performance, and where external evaluation takes the form of high-stakes inspection, as is the case in England. The marriage of self-evaluation and external inspection was prone to fundamental problems and dilemmas in the English context and has resulted in self-inspection where schools inspect themselves against centrally determined criteria using pre-determined protocols, shelve bottom-up self-evaluation initiatives to accommodate the government formula, and where school self-evaluation is used by external inspections to judge its quality assurance system and becomes an extra burden for schools (Hall & Noyes, 2008). As MacBeath (2004: 88) notes, "[t]he lexicon of 'delivery' is indicative of a new world view – teachers as intermediary between producers (government) and consumers (pupils) and self-evaluation is little more than inspection delegated to schools themselves".

In this system, the performances of individuals and organisations serve as displays of 'quality' and stand for the worth or value of individuals and organisations within a field of judgement (Ball, 2003). 'Successful' schools are granted with greater 'autonomy'<sup>3</sup> and financial incentives and 'failing' ones face the politics of blame, greater control and in some cases, even closure (Pierson, 1998). Based on school effectiveness research these policies took the view that the failure of schools to educate children could be attributed to the effect of school practices and overplayed the difference schools could make if they did the 'right things'. Three 'right things' promoted by the government were performance management, interrelated continuous professional development (CPD), and leadership development.

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<sup>3</sup> Autonomy is an overused term, which is rarely defined. In this dissertation, I acknowledge, in agreement with the arguments of Cribb and Gewirtz (2007), that autonomy is by nature multi-dimensional and questioning the interrelationship among agents of 'autonomy', the spheres over which 'autonomy' and its twin concept control is exercised, and different means through which influence is being exercised is imperative to understanding the kind and degree of school autonomy.

The White Paper *Teachers: Meeting the Challenge of Change* (DfEE, 1998c) proposed that support, training, leadership and rewards for teachers were to be used to enhance the quality of education to raise standards. From 2000 the performance management framework came into statutory force to create schools committed to raising standards (DfEE, 2000a, 2000c). Pay-performance links were announced as a strategy to strengthen leadership, and to boost the recruitment, retention and motivation of teachers (DfEE, 1998c, 1999, 2000b; Farrell & Morris, 2004). The introduction of performance related pay for teachers was the extension of the performance pay scheme for head teachers and deputies, which took effect from 1991.

Performance management and its key component performance-related pay were controversial topics. Research findings highlight teacher antipathy to the scheme (Farrell & Morris, 2004; Haynes et al., 2003; Storey, 2000; Wragg et al., 2003), lack of government evidence to suggest a link between low teacher motivation and pay, and between recruitment and retention of teachers and low recognition of good performance Richardson (1999). Additionally studies have found that at the time performance management was introduced, excessive workload was undeniably the key feature of teachers' culture leading teachers to question their capacity to improve when they have no time for improvement (Marsden, 2000; Thomson, 2001). Performance management has also been generally viewed as 'punishment-centred' rather than reward-oriented (Marsden, 2000). Additionally, studies reported that when the value attached to pay is measured relative to other possible benefits, pay does not rate so favourably (Heneman & Milanowski, 1999; Kyriacou & Coulthard, 2000; Marsden & French, 1998). The general message from teachers was that improving the working conditions, increasing salaries, and enhancing the status and recognition of teachers are more likely to have significant impact on teacher retention (DfES, 2001).

Critical voices from the field underline that performance management and its key component performance-related pay is not only about recruiting, motivating and retaining good teachers, it is also the state's attempt to reculture teaching and educational leadership according to the needs of the new system (Gleeson & Gunter, 2001; Ozga, 2000; Thomson, 2001). Leadership preparation and development is an interrelated key strategy of the English reform package through which this reculturing is achieved. The idea that successful school improvement and successful education reform depend on effective leadership has been promoted (DfEE, 1997). The importance of the head teacher legitimised as transformational leaders has been retained, but the involvement of others through distributed leadership has also been advocated (Gunter & Forrester, 2008).

In order to make transformational leaders, New Labour emphasised systematic leadership preparation and development. In England systematic leadership training and development has increasingly taken the form of 'national programmes' developed and delivered by the National College for School Leadership, which has hegemonic control of many continuous professional development courses for school leaders at all levels in the teaching profession (Brundrett, 2008). Underpinned by the National Standards for Headteachers, this framework emphasises standards-based approaches in leadership training and development. These standards have expanded in number between 1997 and 2007; the knowledge and skills head teachers are expected to be equipped with diversified and inflated (Gunter & Forrester, 2008). Concerns exist that such an emphasis on standards for teachers and leaders serves as a means of reskilling and reculturing the teaching profession and of ensuring conformity and compliance to the official codes of conduct (Ball, 1999; Gronn, 2003; Gunter & Forrester 2008). They could be seen as the extension of contextual reductionism of the previous Conservative government because these standards are not derived from particular locales of work, but "are meant to be immune from the exigencies of localism" (Gronn, 2003: 9) while aiming to standardise experience

within different contexts by designing teachers and leaders to the official codes of conduct (Gunter, 1999: 252). Concerns have been raised that such moves may not respond to local needs, may not meet particular needs of participating head teachers, and may not prepare aspiring head teachers for the increasingly complex demands of the role (Brundrett, 2008; Draper & McMichael, 2000; Fidler & Atton, 2004).

### **Collaboration through Networks**

Recently, within the competition driven quasi-market governance, collaboration through networks has gained importance as another strategy adopted to raise standards by reducing school isolation and to move towards a system where education policy set at the national level is delivered by joined-up services (Bache, 2003; Ball, 2007; Hartley, 2007; Hudson, 2007; Ranson, 2008; Rutherford & Jackson, 2006). There are two interrelated objectives of central push towards collaboration.

First, collaboration is seen as a key strategy in raising standards in less successful schools through collaboration with their more successful peers or wider community. The expectation is to create improvement gains by schools helping schools, through sharing "best" practices (Hargreaves, 2004) or by wider community helping schools. More and more schools are therefore becoming engaged in lateral capacity building across schools with more and more school leaders becoming engaged in what Fullan (2006) and David Hargreaves (2004) describe as lateral leadership across schools. This policy is evidenced in initiatives such as the Pathfinder Academy Programme, the National Leaders of Education Programme, Education Action Zones, Excellence in Cities, and the new school governance models such as federations. Partnerships through which leading schools work with less successful schools are a recent policy response to the obstinate difficulties of scaling up educational change common in many countries and a recent addition to the external support repertoire (Thomson, 2007). There is insufficient rigorous research on the impact of these new ways of working, but early studies on Education Action Zones

suggest that they may not be as fruitful as hoped (Gewirtz et al., 2005; Ken et al., 2000). Within the English context, where standards-based reform is still emphasised and schools are in competition with one another for students within a quasi-market, it seems difficult to achieve a high level of interdependence that brings about shared responsibility for one another's progress (Whitty, 2008).

Second, collaboration in the English context serves the purpose of personalising schooling by supporting diverse learning and welfare needs of children. This is most evident in the recent reconstitution of education as children services thorough the Green Paper *Every Child Matters* (DfES, 2003a), the legislations *Children Act* (DfES, 2004), *Education and Inspections Act*, and the 14-19 Agenda (DfES, 2005a) which require schools to work with a more diverse workforce and build networks with a diverse range of external agencies. Work-related learning or the Diplomas, for example, is delivered through numerous schemes and initiatives in and outside schools, including but not limited to work experience, employer visits, business presentations, and mock interviews (Huddleston & Oh, 2004). In the UK at least personalised learning policies have been introduced into an educational landscape ruled by quasi-markets and performativity with the assumption that these policies are compatible with each other. Nevertheless, there are concerns that in countries where standards-based reform has been the norm of which England is one, the dominant conventions and structures allow personalisation only in a very limited sense (Hartley, 2008; MacBeath, 2006), innovative practices vanish to comply with the reform demands (Hargreaves & Goodson, 2006), or do not appear due to fixed ideas about school improvement and performative pressures (Thomson, 2009).

### **Workforce Remodelling**

Over emphasis on performativity within a quasi-market model has caused overload on schools and intensified the work of teachers and school managers (Gunter, 2008). Gunter (2008: 257) notes, "[b]y the mid-1990s certain dysfunctions had been generated through

the workings of the quasi-market, not least long working hours and the unattractive nature of teaching as a career". Most researchers agree that teaching and leading in this restructured educational landscape is stressful and it is common for teachers to feel themselves inadequate in the face of rising expectations and greater responsibilities demanded of them (Brown et al., 2002). Two key factors most cited as being at work in the production of stress among teachers are: intensification of work and the changing nature of the profession from a profession that is largely teaching focused to one that involves significant amount of administration and planning (Brown et al., 2002; Campbell, 1993; Campbell & Neill, 1994; Hargreaves, 1994; Jeffrey & Woods, 1996, 1998; Pollard, 1991; Pollard et al., 1994; Woods et al., 1997).

The work of Campbell and Neill (1994) has demonstrated that not only has teachers' work in primary schools been intensified, but teaching work has also changed radically with classroom teaching constituting only 35 per cent of teachers' work. Other tasks related to teaching involve planning, administration and in-service teacher training. Similarly, Thomas et al., (2004) underline that it was common for teachers to work long hours. The works of Jeffrey and Woods (1996, 1998), Brown et al. (2002), and Woods et al. (1997) clearly note that these factors are involved in teacher stress while the work of Troman and Woods (2001) demonstrates teacher disaffection in terms of the intensification of their work. Additionally, Troman (2000) has found that tightening the control of teachers' work has resulted also in a culture of mistrust, which is another cause for stress and concern.

More recently, there are studies reporting similar problems for school leaders, in particular head teachers (Bottery, 2007; French & Daniels, 2007b; Jones, 1999; PricewaterhouseCoopers, 2007; Southworth, 1995; Thomson, 2008; Thomson, 2009a; Thomson & Blackmore, 2006). The critical role of school leaders has received significant attention in many reform agendas and the work of school leaders has been transformed in many nations. With Local Management of Schools fully integrated into the English

education system, the work of schools in general and head teachers in particular, intensified and diversified to include financial management, resource management, site management and personnel management as well as pedagogical leadership (PricewaterhouseCoopers, 2007; Webb et al., 2006) while their autonomy was taken away by excessive control mechanisms and obsessive concern with performativity (Webb et al., 2006). One of Ball's (2003) policy technologies, managerialism, has augmented the role of headship with that of a business leader whereas his second and third trajectories – marketisation and performativity – have made headship an increasingly stressful profession (Bristow et al., 2007; Thomson, 2008; Thomson, 2009b; Webb et al., 2006).

In parallel to these changes in the work of school leaders, the workload of head teachers has increased dramatically. In the current educational landscape, school leaders have long, unsocial working hours to deal with the demands placed upon them (French & Daniels, 2007a; Southworth, 1995). The increasing complexity of schooling and the multi-faceted role of leading schools have been identified as two causes of demotivation among school leaders and of head teacher shortage (Glatter & Harvey, 2006). As demands have been mounting and stress growing, the number of head teachers who retire before the normal retirement age has increased while at the same time the number of deputy head teachers and middle managers who aspire to headship has decreased leading to heightened concerns that the education sector will face a potential leadership crisis (Hartle & Thomas, 2003; Howson, 2007; Rhodes et al., 2006; Stevens et al., 2005). Bristow et al. (2007) have recently found that headship is often viewed by middle-level managers as a role with long hours, poor life-work balance and endless bureaucracy and these negative perceptions give an indication of why they do not aspire to headship. Scholars argue in response to this 'problematism' that the answer does not lie in thinking about how school system can widen the pool of aspirant head teachers, but in how headship could be redesigned to build more positive perceptions of the role and to make it more attractive (PricewaterhouseCoopers, 2007; Thomson & Blackmore, 2006).

To address the growing problem of work intensification and overload, the Remodelling Workload Agreement (DfES, 2003b) pledged to raise standards by addressing work intensification through contractual change for teachers and school leaders to allow them to focus on their specialisms and have a reasonable work/life balance. This necessitated schools to expand the number of what has traditionally been known as non-teaching staff and to change their roles (Gunter, 2008). A development that has had direct influence on the work of head teachers has been the continued remodelling of headship. Where schools are expected to extend their services to include health and welfare in a campus open to the use of the community, current trends in head teacher remodelling lean towards separating 'administrative leadership' from 'leadership of teaching and learning'. The school business manager, for example, has recently been championed to manage the business side of schooling (Mertkan-Ozunlu, forthcoming). This makes it possible for schools to employ an individual with no Qualified Teacher Status to undertake 'administrative leadership' (PricewaterhouseCoopers, 2007). These developments mean that any individual with long-standing experience within a school environment or with relevant experience in any sector could become an 'administrative leader', which could be constituted as a Chief Executive Position to which the 'educational leadership' report to. Critics argue that this initiative has downgraded the status of teaching and the worth of teaching experience (Gunter & Forrester, 2008).

## **Finland**

Decentralisation, school 'choice', goal steering, managerialism and accountability as key terms also seem to be a critical part of the Finnish discourse. Nevertheless, differences ensue as a consequence of contextual influences. In the socio-cultural framework of the Finnish nation, these educational policies are combined differently, take on a different significance, diverge in appearance and impact, and have different outcomes in practice leading to a unique illustration of the processes of glocalisation (Webb et al., 2006). In



Finland, the emphasis of education policy in the 1980s and 1990s has been to move away from striving for equity through a centralised welfare state governance toward an educational policy based on marketisation and managerialism with the argument that recent reforms have not torn down the welfare state, but have made a good system better (Johannesson et al., 2002; Moss & Muller, 2003). These changes have been interpreted as a response to the pressures of globalisation and as an adoption of 'travelling' policies, but filtered through Finnish welfare state tradition (Rinne et al., 2002; Webb et al., 2004) leading to remarks such as,

At the policy level, it seems that Finland has in 10 years adopted most of the programme of the neo-liberal education policy. However, at the same time it seems that in the level of politics, the change in Finland has not been that rapid. In the field of evaluation and social control, in the field of privatisation and in the field of free school choice, 'progress' has been slow and clumsy. (Rinne et al., 2002: 656)

This has led some to comment that Finland has adopted alternative policy principles and related reform strategies to raise student achievement that differ from those evident in 'travelling' reform strategies and education policies (Sahlberg, 2007; Simola, 2005). Välijärvi et al. have concluded that Finland's success as shown by the international PISA results seems to be attributable to a "whole network of interrelated factors in which students' own areas of interest and leisure activities, the learning opportunities provided by school, parental support and involvement as well as social and cultural context of learning and of the entire education system combine with each other" (Valijarvi et al., 2002: 46) while Hargreaves et al. have observed that,

In its distinctiveness and departure from the predominant global educational reform movement of the past 15 years, that has emphasised testing and targets,

curriculum prescription and market competition, high performing Finland might in this sense be regarded as one of a number of outlier examples of *positive deviance* from which other nations can learn as they rethink their own reform strategies (2007: 11, emphasis in original)

Similarly, Sahlberg (2007: 150) notes that “the Finnish education system has remained quite unreceptive to the influence of what is often categorized as the *global education reform movement* ... that has increasingly become adopted as an official agenda in many parts of the world”. This divergence is demonstrated in more detail below.

### **Finnish Education Reform Package**

The Finnish education system has undergone important changes in the 1990s and 2000s when there has been a trend towards neo-liberal changes of parental choice, decentralisation and school evaluation; however, the neo-liberal policy has been less influential and more modest in Finland in comparison to other countries (Antikainen & Luukkainen, n.d.; Hudson, 2007). Although they have been more modest, it is argued that they still represent a historical shift from the historic Finnish education governance based on the welfare state (Rinne et al., 2002). During this time, the education system has been transformed from being a centrally planned system into a system characterised by decentralisation while maintaining a strong public, professional and political consensus on the expected reform outcomes (Aho et al., 2006; Hargreaves et al., 2007; Rinne et al., 2002). The domains of decision transferred from the central to the local and the type of power endorsed by different stakeholders show significant differences in comparison to England and could even be summarised as developing in the opposite direction, particularly in terms of curricular reforms and the powers Local Authorities (as referred to Municipalities in Finland) have.

There are over 400 municipalities in Finland, which are responsible for organising and partly financing basic education at a local level to offer all children an opportunity to learn in ways that suit their abilities and to support schools to be successful (Eurydice, 2007/2008). Almost all schools are maintained by these municipalities. The powers of municipalities have gradually increased as the central government decentralised a significant amount of its powers to municipalities to include allocating budgets to schools as they see fit, designing curriculum specific to the schools with contributions from teachers, refining the recruitment criteria for head teachers and their work, appointing head teachers and evaluating school progress (Hargreaves et al., 2007). Unlike England where decentralising management to schools has meant weakening of Local Education Authorities, in Finland the power of the municipalities has been sanctioned by the Basic Education Act (Webb et al., 2006). Nevertheless, exactly which of these powers are exercised by municipalities and which are decentralised to schools varies as there are different approaches across municipalities, which are free to choose the approach they see appropriate. Hargreaves et al. (2007: 19) observe,

In the city of Javenpää, for example, all comprehensive schools follow the municipal level common curriculum which has been created in a city-wide cooperative effort with the participation of several hundreds of teachers, led by the municipal department of education. In other cases, such as Helsinki and Tampere, although the municipality plays a very active role in supporting the preparation of school level curricula as well as encouraging intensive cooperation in this area among schools, this does not go as far as planning a common city-level curriculum.

With the move towards decentralisation has come abolition of all traditional forms of control over teachers' work including school inspections, a detailed national curriculum, and officially approved teaching materials (Rinne et al., 2002). The *Framework Curriculum*

*for the Comprehensive School 1994* increased teachers' curricular freedom through the introduction of school-based curricula by abolishing the long-standing subject-based national curriculum in primary schools (Webb et al., 2004). This decentralisation strategy aimed to emancipate teachers from the constraints of the prescribed curriculum, which was observed by policy makers to be a prerequisite for school change. Webb et al. (2004) have found, however, that in practice it has generated feelings of insecurity for teachers who were unfamiliar with the curriculum development and planning and has been a source of work intensification, decreasing morale and growing stress within the teaching profession. As they conclude, "[t]he intention of the Finnish curriculum reforms was to be empowering but this was not the experience of these Finnish teachers, who in practice felt deskilled and devalued" (2004: 90). To reduce time spent on curriculum planning and lighten teachers' workload, national curriculum guidelines with specified content and lesson hours became statutory from 2004. As Hudson (2007: 270) concludes, "the 2004 Finnish national core curriculum contains more specific guidelines and a more detailed contextual framework compared with the 1994 curriculum". This move could be considered as taking a step backwards towards centralisation and getting closer to the English system (Webb et al., 2006).

Within this framework, the National Board of Education steers through national guidelines that local curricula need to address and core objectives that it needs to meet, but does not prescribe in detail the national curriculum. Much of the curriculum is written by teachers at the level of the municipality to ensure close fit to the needs of the students they know best. Although there are a number of compulsory subjects common across schools, it is argued that the curriculum is not preoccupied by prioritised subjects, but is broad in nature and places emphasis on various forms of creativity that have long contributed to the Finnish identity (Hargreaves et al., 2007). In Sahlberg's terms, "[t]he focus of teaching in Finland is typically on learning" (2009: 26). The provision of broad curriculum is important for parents as a whole as demonstrated by Denessen et al.'s (2001) study on reasons for

school choice whose findings have shown that social education is the leading reason for choosing a school while academic achievement is seen as least important along with religious values.

This focus on learning in a broad sense is enhanced by high quality teaching and a culture of trust based on the belief that teachers and school leaders are professionals equipped with the knowledge, skills and the expertise to improve learning for all rather than technicians implementing strictly dictated national policies (Hargreaves et al., 2007; Laukkanen, 2008). Unlike many nations experiencing with ways of making teaching a more attractive profession, usually financial in nature such as performance-related pay in England, teaching is already one of the most popular high status professions in Finland despite having salaries at average level in international comparisons. Three reasons are cited for the popularity of teaching: the autonomy teachers have, the satisfaction they derive from their work (Simola, 2005) and the respect they have within the Finnish community (Hargreaves et al., 2007; Laukkanen, 2008). Hargreaves et al., (2007: 11) note,

while one of the keys to Finland's success appears to be high quality of its teachers, efforts to improve teacher quality in other countries through public relations and enhanced pay miss the point that Finnish teachers are drawn to the profession because of the regard in which it is held in relation to helping bolster and build a wider social mission of economic prosperity, cultural creativity and social justice that is central to the Finnish identity. The calibre of Finnish teachers is, in this sense, directly related to the compelling and widely shared nature of their nation's broader vision.

The high status of teaching and high worth of teaching experience is further evident in its being a requirement for headship and in that teaching continues to be embedded in the

work of head teachers. Hargreaves et al., (2007: 17) note, "principals are required to have been teachers, and all head teachers, even those in large secondary schools, do some teaching every week. With these preceding and continuing connections to teaching, along with affiliation to the same union, leaders do not see themselves nor are they perceived as "the boss" over the teachers".

Classroom teaching attracts some of the best school graduates (Simola, 2005; Westbury et al., 2005) and admission to Initial Teacher Education is highly competitive with only about 10 per cent of the applicants being accepted to the programme annually (Sahlberg, 2009). This allows teacher education departments to have the opportunity to select the best students. Initial teacher education in Finland adopted the two-tier Bologna degree system in 2005. Since then the basic qualification for primary and secondary school teachers is a three-year undergraduate degree followed by a two-year postgraduate studies at Master's level in appropriate subjects. Initial teacher education for all teachers in basic education is delivered by universities<sup>4</sup>, which are not obliged to follow a standardised, detailed curriculum, but are autonomous in designing their curricula within agreed principles and general outlines.

Additionally, in the last decade policies in Finland have moved towards a looser accountability for schools (Webb et al., 1998). Finland has no system of standardised testing or test-based accountability, nor are schools ordered in public performance rankings (Hudson, 2007). It also lacks strong focus on competitive performativity where school performance is closely tied to rewards and punishment for schools and teachers and where attention is devoted to limited aspects of schooling to meet the demands of performativity. As Välijärvi (2003: 13) notes, "[d]espite the emphasis on educational outcomes, the system has not yet included the allocation of state funds to different educational institutions according to the results they have achieved". Consequently,

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<sup>4</sup> Until 1974, teacher education for primary school teachers was delivered by teacher training colleges.

schools do not feel obliged to spend time and resources on test preparation and preparation for inspection or to have a curriculum, which prioritises some objects over others (Sahlberg, 2007, 2009). Sahlberg (2009: 26) underlines,

The focus of teaching in Finland is typically on learning, rather than on preparing students for tests (Berry & Sahlberg, 2006). Different teaching methods are commonly employed throughout the school system. New innovations are fairly readily accepted by teachers if they are regarded as appropriate for promoting student learning. Stress and anxiety among pupils and teachers is not as common as it is within education systems having comparatively more intensive accountability structures.

It has been commented that this enables consistent and sustained focus on learning and leave room for more degrees of freedom in curriculum planning by eliminating the need to focus on national tests (Sahlberg, 2009). Nevertheless, decentralisation has been accompanied by a growing evaluation culture, but the control found in the Finnish system is much more subtle and indirect compared to Ofsted inspections in England.

In Finland there has been a move away from the long-standing national inspection system, which was abolished in 1991, and towards evaluation, which has become a vital element of the Finnish education system since the early 1990s (Simola et al., 2009; Webb et al., 1998). It is argued that in the Finnish model, evaluation primarily serves the purposes of improvement, support and the development of evidence-based policies (Hargreaves et al., 2007; Valijarvi, 2003). Välijärvi (2003: 14) notes,

A further aim of the national evaluation system is to support educational institutions and teachers in the continuous development of education, on the one hand, and to produce and to produce and convey diverse, up-to-date and reliable

information on the functionality and results of the institutions and the entire education system, on the other hand ... Information obtained through evaluation is needed as a basis for making decisions on the solutions that will direct the future development.

Webb et al., (2004), however, have demonstrated that self-evaluation is becoming predominantly an accountability measure. Webb et al., (2006: 420) conclude, "its increasingly bureaucratic, routine and superficial nature meant that the initial enthusiasm for it had largely dissipated and was being replaced with scepticism as to its usefulness". Education is evaluated at school-specific level, regionally and nationally. Evaluation at the school-specific level became compulsory under the latest educational legislation as effective from January 1999 and self-evaluation and teacher assessment of student outcomes have since been advocated as the key. At this level, the focus has been on the measures taken for improvement in teaching, assessment and quality of education offered. Webb et al., (2004) have found, however, that despite the policy rhetoric of the purpose of student assessment being improvement oriented, teachers increasingly felt that assessment was also increasingly being used to serve the purpose of accountability to the municipalities. At the municipality level, evaluation has been on the quality of education with particular attention to the development of self-evaluation tools and the establishment of the quality control systems. In the absence of a national inspectorate and standardised methods of self-evaluation and in a context characterised by decentralisation, municipalities have more autonomy in the way they carry out self-evaluation and how they use self-evaluation results (Webb et al., 1998). Eurydice (2007/2008: 146-147) concludes,

The education provider<sup>5</sup> has the right to choose the evaluators, there are no national guidelines for that. The provider itself can decide on the procedures, too.

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<sup>5</sup> In Finnish context education providers mean municipalities.



The frequency of evaluation depends on the education provider itself as well as the communication on the judgements, preparation of reports and so on. There are no regulations on the use of self-evaluation results. The provider has the right to decide how they are used or implemented in its own organisation and institutions.

High-level of autonomy evident in the system seems to be the consequence of the trust in local decision-making and of the strong belief in the superiority of decisions made at the local level using the expertise rested in the municipalities (Rinne et al., 2002; Simola et al., 2002). Simola et al., (2009: 169) conclude, "There was a remarkable contrast to the international discourse of neo-liberal education: while in many countries the motives inspiring market-driven accountability policies were based on distrust, in Finland the same ideology was motivated by trust". Nevertheless, there are concerns that too much autonomy has produced a 'chaotic situation' where implementation of evaluation policies shows wide variations at the municipal level and the evaluation models municipalities use differ significantly (Simola et al., 2009). Similar concerns have been raised about different approaches to self-evaluation. Webb et al., (2004) have found that approaches to self-evaluation developed by schools have serious limitations as such that data is collected on various, but not always related aspects of schooling and that data tends to be collected using a wide range of techniques with wide variations in rigour. This might be the consequence of the lack of a deliberate capacity-building strategy, which seems to have been the case particularly when these initiatives were introduced.

At the national level, attention has been paid to the efficiency and effectiveness of the education system as a whole, the implementation of education reforms, their outcomes and their impact. Regular assessments have been carried out at the national level in core curriculum subjects, in particular mathematics, literature and mother tongue, but rather than using standardised high-stakes national assessment of student outcomes which as a

'travelling' policy is increasingly evident in Anglo-Saxon countries, this has been achieved through sample-based assessments that do not cover all schools and the whole age group (Laukkanen, 2008; Simola et al., 2009). This sample-based assessment of learning outcomes could be seen as a unique part of the Finnish evaluation model. An interrelated characteristics of the Finnish evaluation model is the unambiguous consensus against using the results of evaluations to provide ranking lists of schools to compare them in terms of performance. This is in stark contrast to the English model. Simola et al. (2009: 172-173) underlines,

practically no education official or politician has supported the provision of ranking lists or making schools transparent in competition by comparing them in terms of average performance indicators ... [T]here has been clearly articulated antipathy towards ranking lists. The informal consensus at the municipal level not to study schools in a way that would enable the results to be used to produce ranking lists is a good example here.

Thus, evaluation provides information for administrative bodies and schools rather than serve the purpose of providing information on which school choice can be based. School choice has been made possible in Finland by the Basic Education Act 1998, but the freedom of choice is limited. It is formulated as the right to attend the school of one's choice if it has room left after enrolling local students who have the priority to attend their local neighbourhood schools (Simola et al., 1999). This is seen by some as a way of precluding segregated schools (Simola et al., 1999; Denessen et al., 2001). Nevertheless, in an education system where school enrolment has long been managed by school districts and where the role of parents has been rarely acknowledged before the 1990s, this was an important move towards the creation of school markets (Rinne et al., 2002). Seppänen has demonstrated that despite the limitations of school choice in Finland, the impact of the markets started to be felt with students requesting to be transferred out from

less popular schools to more popular schools that are able to accept students outside their districts because their districts are not big enough to meet the capacity of schools (Rinne et al., 2002).

## Conclusion

There is now an international policy discourse of a common policy language that underlines patterns of national response to three interrelated global challenges for education reform: to increase economic competitiveness by educating young people of knowledge economy; to address the negative social consequences of the knowledge society; and to address the deepening inequalities associated by globalisation and the knowledge economy by addressing inequalities within and between schools. To some extent this is a consequence of increased potential for policy borrowing.

This chapter has argued that this international discourse is subject to considerable 'glocalisation' because contextual peculiarities of a particular country inevitably influence 'travelling' policies and reform strategies and produce different practices. Through its focus on two countries, both engaged in extensive efforts to reform their education, it has demonstrated various layers of complexity within the globalisation and 'glocalisation' processes. I conclude this chapter by quoting Carnoy and Rhoten (2002: 6), who underline that "policies prescribed by the same paradigm but applied in different contexts produce different practices – so different in some cases – that it is difficult to imagine that they were the result of the same policy". In the next two chapters I present some of the local challenges and dilemmas for improvement plans in the TRNC. If internationally-translated improvement plans are to be effective in meeting long-term needs of the education system, they must be filtered through these local contingencies.

# **Chapter 3**

## **The Recent Reform Initiative within its Socio-Political Context<sup>6</sup>**

### **Introduction**

In Chapter 2, I argued that sweeping educational reform is a phenomenon of the times. Around the world, nation states of various sizes, locations, and persuasions are attempting to not simply to initiate change, but also to sustain it on a large scale (Fullan, 2000). On one hand, a set of travelling global educational policies have emerged through which local contexts are being invaded, and systems and structures across the nation states are being reshaped and reconceptualised (Ball, 1998) in intended and unintended ways. On the other hand, as I argued in Chapter 2, while there is a growing trend towards policy convergence, there is also growing recognition of reciprocal local impact on these global policies through which global policies are adapted or integrated with local policies (Ball, 2001; K. Jones & Alexiadou, 2001; Lingard, 2000; Ozga, 2005; Ozga & Jones, 2006). This results in different practices, each with varying impacts. The travelling policies and reform strategies have also been shaped, driven and constrained by the multifaceted, complex interrelationship between context and culture-bound socio-political dynamics and the new globalised economic and social environments (Ball, 1998).

This chapter examines how this agenda is playing out in one physically small but politically vexed country. The case of the TRNC represents an instance of 'vernacular globalisation' in which local histories and narratives of a nation have as much impact on reform as the global imperatives or drivers of regional economic and social association. This chapter is divided into three sections. The first section sets the context by outlining

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<sup>6</sup> A journal article informed by this chapter was published in 2009 (Mertkan-Ozunlu & Thomson, 2009).

an account of the socio-political context and the 'Cyprus Problem' that visits critical moments in history. This provides a basis for the argument this chapter sets forth and the counter arguments it invites. Without such an account, the chapter would, by and large, fail to make sense due to the impact of the 'Cyprus Dispute' on socio-political and educational issues (Crellin, 1979; Persianis, 1996; Weir, 1952). This account is in line with the arguments of Hayden White, Louis Mink and Frank Ankersmit. It deals with constructed historical understandings rather than objective historical pasts. It supports the view that getting true statements is possible, but the whole picture, the whole context in which these facts make sense is inaccessible. There is always another picture or another potential narrative that could have been written (Ankersmit, 1997). Section 2 presents the reform agenda this theses focuses on. It briefly explains the rationale behind it and the main challenges policy makers need to address to make the reform vision a reality. In the third section, I focus on the Educational System in the TRNC and demonstrate how it is being reshaped by the reform agenda.

## **Historical Narratives and Socio-political Context**

Very small in size and never densely populated, Cyprus has the misfortune of having a location of high strategic importance in the Eastern Mediterranean. On account of its position, thousands of years of military and political struggles have shaped the lives of the inhabitants of the island. The island was annexed by Britain in 1878, which marked the beginning of over eighty years of British rule on the island. At the outset of British rule, two socially and culturally segregated nationalist cultures co-existed, Greek and Turkish. These segregated communities controlled the political agenda on the island during and after the colonial period (Persianis 1996; Ramm 2002-2003). The failure to build co-operation and a common political landscape and agenda on the island led to the formation of separate national territories. By the end of the 1950s, the number of mixed villages had declined dramatically following growing disparity between political aspirations of Turkish

and Greek Cypriots (Patrick, 1976).

Not much information is available on the condition of education in Cyprus at the beginning of British rule. From the limited official documents available, one gets a partial picture of the system that the Director of Education, then called the Inspector of Schools, faced upon his appointment in 1880: an education system that was based upon recognition of the existence of two distinct communities, Turkish Cypriot and Greek Cypriot. Separation between the educational affairs of two communities had been established during the Ottoman period, in the 16<sup>th</sup> century, under the *millet* administrative system, allowing religious authorities to rule their own non-Muslim minorities. Turkish Cypriot schools, then called Muslim schools, were administered by Moslem authorities; social education and religious issues of the Greek Cypriot community were regulated by the Greek Orthodox Church, the supreme authority for educational affairs. Greek Cypriot schools were sustained by the contributions of the church, the local Greek Cypriot community and Greek communities beyond the island (Newham, 1902; Weir, 1952).

During the initial stages of the British colonial period, separation between the Turkish and Greek Cypriot education systems was maintained and stabilized by the Education Laws of 1895, 1897 and 1905. The control of education was exercised by three popularly elected authorities: (a) Turkish and Greek Cypriot Boards of Education, established in 1881; (b) Village Communities; and (c) District Communities. Village Communities and Boards of Education had direct control over the curriculum, appointment, dismissal and duties of school teachers, and the expenditure for education (Talbot & Cape, 1913). This relatively decentralised educational policy exercised during the initial periods of the British rule was preserved until an investigation was made into the whole education system by Talbot and Cape in 1913. Supported by the investigation report, educational policy gradually moved towards centralisation to increase direct control by the colonial government over educational matters and Cyprus became home to massive reforms to improve education

and prevent the spread of national ideals and political aspirations by bringing education policy under Government control (Weir, 1952). Reports of the then Department of Education reveal two major motives behind educational reforms: dissatisfaction with the work of the education authorities, and growing concern over the use of education as an instrument to achieve political aspirations, particularly by Greek Cypriots.

Appointment, promotion and dismissal of elementary school teachers were brought under Government control by the Education Laws of 1920 and 1923; government control over elementary education was further increased by the Education Laws of 1933 and 1937 to control the curriculum, prescribe text books, appoint members of the Boards of Education, and control Education Funds. Until the Education Law of 1933, text books used in Cyprus were supplied by Turkey and Greece respectively (Feridun n.d.; Weir, 1952). A Department of Education Report (1934-1935) shows that curricular changes made during the second policy phase had three objectives: (a) to weaken the links between education systems in Cyprus and those in Turkey and Greece; (b) to diminish nationalist loyalties to Turkey and Greece by reducing the Turkish and Greek influence on school curricula; and (c) to advance the curricula to keep pace with educational developments in England. Particular emphasis was paid to history, geography and English; national symbols and textbooks from Turkey and Greece, previously common in Turkish and Greek Cypriot schools, were prohibited (Feridun n.d.; Weir, 1952). As the Education Department (1955: 14) notes in the Education Development Plan 1955-1960,

In the elementary schools Government selects, trains, appoints, pays, transfers and pensions all teachers; Government prescribes the curriculum and the text books; Government gives grants towards the payment of other charges in all schools; Government examines, amends and approves the estimates of expenditure.

Through the Education Laws of 1952 and 1954, Government control over secondary education was increased further, to include the power to deal with 'inefficient' schools and to make new arrangements for the management and control of these schools ("The Secondary Education (Amendment) Law, 1954", 1954). One of the key reasons for this increased control was the growing concern for the quality of education. Gwilliam (1953: 32) reports,

With the exception of the English College at Nicosia which is a Government school, secondary schools are run by the Greeks and Turks in slavish imitation of Greek Gymnasias and Turkish Lycees. After six years of what can be, and mostly are, the green pastures of primary education, the boys and girls go into an intellectual desert for six years. This is hardly an exaggeration because the methods of teaching and the content of the curricula are based upon parrot repetition, word analysis and formal class work even in practical subjects.

Teacher training was also brought under government control with the opening of the multiracial Teachers' Training College, Morphou, in 1937 (*Challenges of Urban Education: Sociological Perspectives for the Next Century*, 2000). The Teachers' Training College, established in 1937, replaced the main providers of teacher training, the Turkish Cypriot Moslem Lycee and the Greek Cypriot Gymnasium, Nicosia, that functioned separately for the two communities before the establishment of the Training College. The Teachers' Training College was later moved to Nicosia and was called the Teachers' Training Centre in 1957. It was separated into two sectors in 1959 and has, since then, maintained its separate status (Feridun n.d.).

Despite increasing central control over education, the British colonial period was marked by armed Greek Cypriot rebellion for territorial self-determination – Enosis, union of the island with Greece. Greek Cypriots' political desire to be a part of the nation they self-



identified with was illegitimate and unacceptable for Turkish Cypriots. Taksim, call for partition of the island and partial union with Turkey, arose as a juridical plebiscite on Enosis and a demand for national self-determination. This conflict is critical in showing the lack of a sense of shared nationhood and the same aspirations, the willingness for deeper affinity. Enosis and Taksim embody and reflect the depth of political division on the island. Attempts were made to establish a modern nation state in 1960 when the Republic of Cyprus, with a unitary government structure but communal educational and religious chambers, was established. With the establishment of the Republic of Cyprus, the control of education was once again passed to communal chambers (Article 87, Constitution of Cyprus) and has maintained its separate status ever since.

The establishment of a modern nation-state did not create a nation sharing common political aspirations, unity of purpose, willingness for deeper inner-community affairs, or an image of Cypriots connected across time and space (An, 1998; Stavrinides, 1999). Not supported by national reengineering and disheartened by negative conceptions of the 'other' well established in the lived experiences of pre-1960, this political partnership did not last long and Cyprus became home to 11 years of intercommunal struggles between the period of 1963-1974, resulting in mass on-island migrations (Attalides, 1979; Ertegun, 1982; Patrick, 1976).

The island was partitioned by the UN 'green line' in 1964 to prevent future struggles, and was physically divided into North and South in 1974. Today, Turkish Cypriots live in North Cyprus governed by the Turkish Republic of Northern Cyprus (TRNC), founded in 1983; Greek Cypriots reside in the south under the control of the Republic of Cyprus, established in 1960. This partition is the most visible scar of the long lasting, widely disputed 'Cyprus Problem', the result of diverse nationalist realities and aspirations (Bryant, 2001; Fisher, 2002; Stavrinides, 1999). These still wait for a solution. UN Security Council Resolutions 541 and 550, describe the attempts to establish TRNC as

'legally invalid' and call on all countries not to recognise it. The TRNC has not been politically recognised as legitimate, and the North has experienced a range of internationally-imposed social, political and economic embargoes as a result (UN Security Council, 1983, 1984). In effect, Turkish Cypriots have been denied:

- internationally-recognised passports. Passports issued by the Turkish Republic of Northern Cyprus have not been recognised by many countries, forcing residents of the TRNC who wish to travel abroad to obtain passports either from Turkey or more recently from the Republic of Cyprus;
- direct trade links with other world markets. Rulings of the European Court of Justice (1994) against the British practice of importing from TRNC in 1994, increased limitations and constraints (European Court of Justice, 1994);
- internationally-recognised addresses or telephone numbers. The TRNC postal administration is denied access to the Universal Postal Union. All postal correspondence must transit via Mersin 10, Turkey;
- ports and airports open to direct international trade and travel, since 1974. Travel to TRNC can only take place via a stopover in Turkey;
- the right to take part in or host international sports or cultural events. No teams or individuals have participated in such events since 1963.

With the accession of the Republic of Cyprus to the European Union, the 'Cyprus Problem' was promoted onto the European political agenda. The world has witnessed heated political traffic to and from the island, increasing bi-communal efforts to spread mutual respect and understanding between two communities and, in early 2000s, mass demonstrations in the North to pressure negotiators to reach a workable solution before Cyprus' accession to the European Union. The comprehensive plan prepared by (then) UN General Secretary Kofi Annan was taken to referendum in 2003 after being revised three times. UN interventions dating back to 1968 culminated in the approval of the final

plan by residents of the TRNC and the rejection of it by citizens of RoC (United Nations, 2003). 'Cyprus' joined the European Union in 2004 as a divided island where diverse political aspirations still exist.

Problems in the TRNC are legion; this chapter addresses only those specific to education reform: (1) macroeconomic problems and increasing unemployment, (2) demographic changes, and (3) political uncertainties.

## **Macroeconomic Problems and Increasing Unemployment**

The TRNC has invaluable economic assets, such as major historical sites of global importance, exceptional unspoilt beaches, and fertile agricultural land. However, its economic potential has not yet been fully tapped as evidenced by slow economic growth and persistent development gap between the RoC and the TRNC (Noë & Watson, 2005; Sertoglu & Öztürk, 2003). Examination of government budget reports reveals chronic budget deficits, low local investments, and dependence on Turkish aid and loans as major macroeconomic concerns. This disappointing performance cannot be explained simply by the impact economic embargoes and political isolation strengthened by the decision of the European Court of Justice in 1994. As it would be wrong to deny the impact of non-recognition on the economy of the North (Ayres, 2003), it would be simplistic to ignore the role of the poor development strategy adopted by the state (Ugur, 2003).

Throughout the post-1974 period, the North Cyprus has employed an economic strategy that encouraged employment by the state rather than entrepreneurship as a means of job creation. This repressed productive project investment and engendered dependence on Turkish aid and loans. Examination of government budget reports provides an insight into the nature of the governance model in the TRNC and situates the public sector as one of the largest employers in the country. This is illustrated in table 1.

**Table 1: Employment by sector figures**

Sectors	1983	1986	1989	1992	1995	1998	2001	2003	2006
1. Agriculture	36.0	31.4	27.6	25.0	22.8	18.7	16.5	14.5	11.0
2. Industry	9.8	10.3	11.3	11.0	10.9	10.0	9.6	9.3	9.0
2.1. Quarrying	1.0	1.0	1.3	1.3	1.3	1.2	1.2	1.3	1.4
2.2. Industrial Production	7.2	7.5	8.3	8.1	8.0	7.2	6.9	6.6	6.2
2.3. Utilities	1.6	1.8	1.7	1.6	1.6	1.6	1.5	1.4	1.4
3. Construction	6.2	9.0	10.6	12.3	12.5	14.3	15.6	19.7	20.3
4. Tourism & Commerce <sup>1</sup>	8.9	8.9	9.4	10.1	10.9	10.6	10.7	11.2	12.3
4.1. Wholesale & Retail Commerce	7.4	7.1	7.1	7.0	7.1	6.8	6.7	6.8	7.6
4.2. Hotels & Restaurants	1.5	1.8	2.3	3.1	3.8	3.8	4.0	4.4	4.5
5. Transportation & Communication	6.8	7.2	7.9	7.8	8.5	8.7	9.0	8.7	9.1
6. Financial Services	2.3	2.5	2.7	2.8	3.1	3.4	2.7	2.5	2.3
7. Private Sector Professions <sup>2</sup>	7.3	7.8	8.4	9.1	9.6	13.8	15.9	15.3	17.7
8. Public Services <sup>3</sup>	22.7	22.9	22.1	21.9	21.7	20.5	20.0	18.8	18.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: SPO, 2006.

This breakdown, which has a sole category relating to 'public services' as a sector, does not include the entire proportion of the workforce under government payroll. The far-reaching household survey conducted in 2004 reports that 33.3 per cent of the workforce is on the government payroll, which situates the government as the largest employer. This seems to be in line with common public perception and popular press reports. This results in personnel expenditures amounting to over one-fourth of the government spending on average and over 33 per cent in 2006 (State Planning Office, 2006). Public enterprises and institutions are also the main borrower, through bank loans, at 35 per cent of the total (State Planning Office, 2007). This creates a crowding out effect that hampers private investment by reducing the availability of loanable funds and contributes to the failure to reduce the high proportion of the public sector in the economy, which has long been one of the reasons for low public savings. This unsustainable strategy has in time led to

chronic high budget deficit and a low share of investments, funded mainly by financial aid and loans from Turkey, leading to economic dependency. This is illustrated in Table 2.

**Table 2: Chronic high budget deficit and low share of investments.**

	1983	1986	1989	1992	1995	1998	2001	2003	2006
<b>Budget Revenues</b>	<b>16,274.2</b>	<b>65,888.6</b>	<b>232,941.6</b>	<b>1,132,202.1</b>	<b>9,758,343.6</b>	<b>98,140,537.5</b>	<b>465,990,013.2</b>	<b>1,034,149,136.3</b>	<b>1,710,566,495.0</b>
Local Revenues	8,628.8	33,281.0	195,748.7	876,946.5	8,463,386.0	62,798,381.2	261,902,473.9	600,616,770.8	1,166,212,341.4
<b>2. Foreign Aid and Credits</b>	<b>7,635.4</b>	<b>32,607.6</b>	<b>37,192.9</b>	<b>255,255.6</b>	<b>1,294,957.6</b>	<b>35,342,156.3</b>	<b>204,087,539.3</b>	<b>433,532,365.5</b>	<b>544,354,153.6</b>
2.1. Foreign Aid	3,912.7	14,607.6	37,192.9	150,698.5	1,294,957.6	19,019,387.6	58,587,796.0	163,813,409.4	283,402,953.6
2.1.1. Republic of Turkey	3,866.2	11,701.7	33,297.3	149,212.7	1,253,647.9	18,958,063.2	58,476,358.8	162,356,671.2	283,260,922.7
2.1.2. Other	46.5	2,905.9	6,677.4	1,485.8	41,309.7	61,324.4	111,437.2	1,456,738.2	142,030.9
2.2. Credits	3,722.7	18,000.0	-	104,557.1	-	16,322,768.7	145,499,743.3	269,718,956.1	260,951,200.0
2.2.1. Republic of Turkey	3,722.7	18,000.0	-	104,557.1	-	16,322,768.7	145,499,743.3	269,718,956.1	260,951,200.0
<b>Expenditures</b>	<b>16,274.2</b>	<b>70,474.0</b>	<b>257,142.9</b>	<b>1,369,323.9</b>	<b>13,655,393.2</b>	<b>105,910,719.5</b>	<b>492,609,666.7</b>	<b>1,027,199,638.9</b>	<b>1,744,990,966.5</b>
1. Current Expenditures	7,575.1	32,418.2	129,114.0	654,652.1	6,263,359.4	39,372,738.5	162,283,573.5	334,498,045.2	698,912,430.3
1.1. Personnel Expenditures	6,032.0	27,676.0	108,093.1	557,737.0	5,509,473.8	34,074,324.2	137,522,686.8	285,819,431.5	607,941,137.8
1.2. Other Current Expenditures	1,543.1	4,742.0	21,020.9	98,915.1	753,885.6	5,298,414.3	24,760,886.7	48,678,613.7	90,971,292.5
2. Transfers	4,801.1	25,529.7	85,584.6	496,217.1	5,794,161.5	41,169,950.9	261,048,321.4	506,948,350.6	731,024,119.1
3. Defence	1,261.7	4,982.0	12,550.0	84,150.0	747,500.0	11,000,000.0	34,870,000.0	68,918,000.0	100,000,000.0
4. Investments	2,636.3	7,544.1	29,894.3	134,304.7	850,372.3	14,368,030.1	34,407,771.8	116,835,243.1	215,054,417.1
<b>Balance of Budget</b>	<b>47,040.2</b>	<b>-4,585.4</b>	<b>-24,201.3</b>	<b>-237,121.8</b>	<b>-3,897,049.6</b>	<b>-7,770,182.0</b>	<b>-26,619,653.5</b>	<b>6,949,497.4</b>	<b>-34,424,471.5</b>

Source: SPO, 2006

In the TRNC, macroeconomic underperformance has failed to generate demands for improving government structures; instead, it has created dependence on and competition for public employment. This has enabled political parties to use state authority to meet personal aspirations and distribute quasi-private goods according to personal and political associations, rather than according to merit or need. This has generated an election system and interest group lobbying that is geared towards rent seeking, creating continuous support to the political system and government structures that have long been the main architects of the macroeconomic underperformance (Ugur, 2003). This vicious cycle has created a half-paralyzed public sector and political system. While the government has been focused on internal political struggles, its failure to develop a significant private sector combined with its apparent lack of global experience has hindered the opportunity to establish a competitive market economy. This subsequent lack of opportunity propels many with exactly the kinds of skills and qualifications claimed necessary for the knowledge economy to leave the island. As is explained in more detail in following sections, the 'brain drain' from the TRNC is now a recognized phenomenon, but it cannot be addressed by public and private sectors that are lacking capacity.

Another major macroeconomic concern is the growing unemployment and underemployment among university graduates. As Kader, a policy officer, states

Because education is not planned properly, especially higher education, there are excessive graduates in many fields, much more than we, either the state or the private companies, can employ. A lot more students are also accepted to the university. Those graduating from a field not in demand create the unemployed mass.

Official statistics have denied the recent growth in the number of unemployed, claiming that the unemployment rate has not exceeded 1.60 per cent, a very low figure. Despite the

tendency to accept official figures, the reliability of the number claimed is occasionally questioned. According to the household survey conducted in 2004, overall unemployment in North Cyprus is 9.4 per cent and unemployment among the age group of 15-24 is 23.6 per cent (State Planning Office, 2004).

## **Demographic Changes**

The demographic structure of North Cyprus has changed dramatically over the last four decades. The years 1963 to 1974 were marked by on-island migration –Turkish Cypriots moving to the north and Greek Cypriots to the south – forming two mainly 'homogenous' nations. The decade was also marked by the migration of Turkish Cypriots from the island in large numbers, to Turkey, the EU and beyond. Falling numbers on the island have been deliberately compensated for by settlers of Turkish origin, as part of a settlement policy initiated by Turkey and the Turkish Cypriot authorities (Hatay, 2005). The initial government sponsored wave of migrants was followed by a second wave of self-initiated migration from Turkey, which was limited and controlled by Turkish Cypriot authorities. This second wave was later followed by a third, a new and uncontrolled influx of immigrants of low socio-economic background (Durber, 2004). Migrants from the second wave have largely acquired Turkish Republic of Northern Cyprus citizenship through naturalisation. Those who remain Turkish nationals are registered workers with a valid work permit. They reside in the TRNC and their number shows a stable pattern over years. Migrants of the third wave are seasonal workers who have a significant turnover and who live in 'primitive conditions' (Hatay, 2005).

To exert more control on migration from Turkey, restrictions were applied through new legislation in 2004 and 2006. A new protocol between Turkey and TRNC signed in 2004 (KKTC'nde Bulunan Turk Vatandaslarinin Ikamet, Calisma ve Sosyal Guvenlik Haklarini Duzenlemeye Iliskin Protokol 2004) and changes made to the immigration law (Yabancilar



ve Muhaceret (Degisiklik) Yasasi 2004) put restrictions on working and staying on the island by: (a) allowing only those entering TRNC with a valid passport to apply for a work permit or the right to reside, and restricting the duration of stay on the island to one month; (b) preventing employers from employing workers without a valid work permit; and (c) requiring those entering TRNC with an identity card to show a return ticket to Turkey, sufficient capital, and a place of stay when questioned at the Customs. The law allows officials to impose a fine and send those who fail to meet these standards back to their country of origin, in this case Turkey. Employers are obliged to obtain work permits for those with foreign nationality by the Work Permit Law, which came to effect in 2006.

It is common for recent migrants from Turkey to live in neighbourhoods with their own subcultures and to have minimal contact with other communities in the TRNC. Some migrants do live in relatively stable social structures. Others are seasonal temporary residents from Turkey and have a high turnover. It is common for them to move with their families as conditions permit to work in Turkey when it is more profitable, and then to come back to the TRNC when it is more lucrative to be there. When they are in the TRNC, it is common for women to work as cleaners, often for TRNC citizens, and for men to work as blue-collar workers. When they are in Turkey, they usually work in the fields. The number and status of migrants from Turkey prompted international political debates on who lives in the north of the island, the number being inflated or deflated to suit various ideological purposes. No systematic, rigorous study has been carried out on the number of Turkish settlers, and specifically on migrants of the second and third waves. Political disputes have been based on rough estimates (Guryay & Safakli, 2004; Hatay, 2005).

Needless to say, these are complex demographic realities and the waves of migration have created complex socio-political challenges. Nevertheless, to date, political disagreements over numbers have dominated the discussions: the effects of changing demographic structure on the socio-economic and socio-cultural dimensions of the north

have not been the focus of debate. Among the limited studies carried out is one statistical study that found that unrecorded employment has serious negative impacts on the socio-economic structure and public finances of the TRNC (Guryay & Safakli, 2004).

Recently the outmigration of Turkish Cypriots has intensified further, changing the demographic structure in the TRNC. An increasing number of Turkish Cypriots have acquired Cypriot citizenship in addition to their TRNC citizenship using their rights given by the constitution of the Republic of Cyprus in the EU. With the freedom to live and work in the European Union granted to Cypriot passport holders after Cyprus' accession to the European Union, it is now common for these Turkish Cypriots to study, live and work in the EU. An increasingly popular destination is England.

The first modern wave of Cypriot migrants, Greek and Turkish, arrived in London in the 1950s (Oakley, 1970, 1979). With limited migration restrictions, this movement increased steadily and a mass exodus driven mainly by economic motives peaked in 1960-1 before it was forced to decrease by the Immigration Act of 1962 (Ladbury, 1984). A second wave occurred in the aftermath of the 1974 inter-communal violence but this wave was smaller than the first (Canefe, 2002; Issa, 2005). Post-1974 entries are assumed to constitute a small part of the Turkish Cypriot diaspora. Cypriot communities were first established in the Camden Town area, then called 'Little Cyprus', spreading out and concentrating in North and North-West London (Issa, 2005; Oakley, 1970). Many first-generation immigrants were self-employed in the service sector in ethnic businesses, and the tendency to become small business owners continued with younger generations (Ladbury, 1984). The second and third generations, however, are moving out of established traditional niches (Mehmet Ali, 1991). Recently, the nature of movement from North TRNC to England has changed, particularly after the accession of Cyprus to the European Union. The migration of low-skilled workers has started to be replaced by the movement of the well-qualified and skilled, often through study in British higher education institutions.

Although there is no accurate data on the numbers involved, there is a growing recognition that this movement is accelerating and that a significant proportion of students stay in England after completing their studies. This higher-skilled mobility can be expected to have impacts on both the sending and the recipient countries, in this case the TRNC and England.

A small community, the TRNC clearly has a capacity problem, and has so far failed to build human labour skilled to compete at national and multinational levels. If the outflow from the island (whether through education or through professional migration) develops into a substantial length of average stay, the loss of a significant proportion of skilled workers can be expected to have serious negative impacts. The negative consequences of outmigration have already been outlined: expert migrants enrich the recipient country and impoverish the sending nation. This has been the case with previous brain drain arguments as the name implies (Crush, 2002; Selassie & Weiss, 2002). Over time, the perceived negative impact of brain drain has been altered by stress on positive externalities, such as remittances and the possibilities of international trade networks. By the last decade, the first signs of a new notion of brain circulation were noted. When it first appeared, this argument noted that numbers of migrants eventually retired home. Recently, it has been extended to include highly-skilled migrants earlier in life (Lowell & Findlay, 2001; Morgan et al., 2006). This argument has gained popular attention through cases such as India, Israel and Ireland. The simple model of sending and recipient countries has also been nuanced. Meyer (2001), for instance, portrays a hierarchical model in which intermediate countries receive labour from elsewhere while at the same time export some of their own highly skilled to OECD countries. Meyer's hierarchical model coincides with the experiences of the TRNC, which receives labour from Turkey while exporting increasing numbers of its current or potential knowledge workers to EU countries.

Easier and cheaper international travel offer the heightened possibility of sustained and regular transnational diasporic experiences that are unimpeded by national borders (Portes et al., 1999; Tololyan, 1991, 1996). Dramatic changes in information and communication technologies have also had an impact on the patterns and experiences of migration. With the increased availability of new ICTs, there is possibility for those with a high level of expertise to be functionally mobile without leaving a particular setting, by using cyberspace. These combined trends create new opportunities to strengthen interactions of diasporic communities within home and recipient countries and allows the opportunity to accumulate human capital and generate economic remittances without being severely constrained by geographic locality (Teferra, 2004).

In the light of these relatively recent dynamics, there is a growing consensus that skilled migration has the potential to bring substantial gains to both the sending country and the host country when well managed. Following this, there have been deliberate attempts to mobilise talent and skills in some countries such as Ghana (K. King & McGrath, 2002) and South Africa (McGrath & Akojee, 2007). In many others, less effective, no mechanisms exist to benefit from this potential. TRNC is among the small states in which no mechanisms exist. Unless measures are taken and policy strategies are developed to harness the potential of the mobility of high-level expertise, it is very likely that the TRNC will suffer from its failure to turn the current brain drain into effective brain circulation. Without these policy measures, these negative impacts may develop into a vicious cycle that intensifies the loss of human capital.

## **Political Uncertainties**

Following admission of the 'Cyprus problem' to the European political agenda with the application of the Republic of Cyprus to the European Union in 1990, there were multiple international interventions on the island seeking a solution to the dispute. Different models

were proposed to solve the problem, but none stayed on the political agenda long enough to reach an actual settlement. In the early 2000s, a new political agenda for social and political restructuring, reunion, and EU membership emerged. Turkish Cypriots united to pressure all parties involved to reach a workable solution to join the EU as a united island, and to change the post-1974 political dynamics. Gates between the North and South, which had been strictly guarded to prevent contact of any kind between the communities, were opened in 2003. North Nicosia in general, and Inonu Square in particular, saw mass demonstrations. Supported by a large majority, supporters of the new political agenda came to power in the TRNC.

One problem political uncertainties cause is multiple models of Turkish Cypriot national identity. This renders it impossible to talk about a single concept of national identity in the TRNC (Killoran, 1998; Ramm, 2002-2003). Traditional Turkish nationalism, an ideology stressing national links with Turkey and downplaying differences between Turks and Turkish Cypriots, dominated the political arena and agenda for many years. Supporters of this ideology worked to construct a Turkish representation of history, and to cultivate a sense of belonging to Turkey, to produce an identity that is predominantly Turkish (Killoran, 1998). Education protocols of 1987, 1991, and 1995, signed by TRNC and Turkish authorities, strengthened existing relationships to allow: (a) student, teacher and managerial exchange between schools in the TRNC and Turkish schools; (b) lecturer and researcher exchange between universities in Turkey and the ones in the TRNC; (c) exchange of textbooks exchange to be used in state schools; (d) accreditation of school and higher education diplomas; and (e) students and teachers to be invited to Turkey and the TRNC during national festivals ("Egitim, Bilim ve Kultur Alaninda Isbirligi Protokolu (Onay) Yasasi", 1987; Egitim, Bilim ve Kultur Alanindaki Isbirligi Protokolu (Onay) Yasasi", 1991; Egitim, Bilim, Kultur ve Teknik Alanda Isbirligi Protokolu (Onay) Yasasi", 1995). These protocols failed to achieve a genuine reciprocal exchange and led to one-way teacher and textbook import from Turkey, provided free of charge. This view has been

under challenge for some time.

A second model, Cypriotness, was introduced to the political arena in the mid-1970s to create a Turkish Cypriot identity to oppose Turkish nationalism and promote 'Cypriotness' with a common history and tradition (Ramm, 2002-2003). This ideology failed to have any significant importance in the political arena then dominated by Turkish nationalism. A third model, Cypriot Turkish Nationalism emerged in late 1990s to create a distinct Turkish Cypriot identity in the Turkic world. Like Cypriotism, this concept failed to gain significant support among Turkish Cypriots. A fourth model emerged in recent years. It emphasized a democratic and fully independent Turkish Cypriot state, underlining difference between those of Turkish origin and North Cyprus origin while putting little emphasis on common Cypriot traits and history. This ideology grew in importance over years and managed to dominate the political arena, outweighing Turkish Nationalism. A more European outlook with a distinct Cypriot flavour is now more the norm.

The TRNC now faces very particular problems. These are knock-on effects of the failures in both public and private sectors, growing levels of unemployment, demographic changes, and political uncertainties. In sum:

- the country has a capacity problem. It has little experience within global knowledge societies, and has so far failed to build human labour skilful enough to compete at national and multinational levels;
- there is a serious risk of escalating the brain drain from TRNC to European countries unless mechanisms are established in TRNC to engage with the reality of increasing student mobility in a way that maximizes the benefits and minimizes the risks for TRNC;
- universities in the north have shown consistent and considerable growth contributing to the Turkish Cypriot economy (Katircioglu & Bicak, 1996). Because

their clients are mostly Turkish and Turkish Cypriot students, these universities now face the risks of losing their clients to European universities unless they create mechanisms to help attract more students from other countries and to increase the quality of education they offer;

- the large number of unskilled recent migrants and the transient population have very particular and complex needs which place heavy and expensive demands on particular schools and teachers;

There is thus a very specific 'glocal' (Robertson, 1995) context in which educational reform must be developed and implemented.

## **Recent Educational Reform Agenda**

The new pro-European government mounted a large-scale educational reform agenda following the 2004 referendum to equip TRNC residents with the knowledge and skills to take their place among knowledge societies, to support the social, cultural and economic development of residents, to ensure every child is provided with high-quality education, and to move away from teacher-centred to student-centred pedagogy (Milli Egitim ve Kultur Bakanligi, 2005). There are three other important characteristics of the reform initiatives:

- (a) directions for change are influenced by educational systems in the EU. The explicit aim is to harmonise the TRNC education system with the underlying principles of the European Union;
- (b) a top-down approach, in which stakeholders are expected to carry out the decisions made by key policy makers, is advocated. This produces a highly regulated environment in which the administration and management of education is centralised to a large extent;

- (c) an explicit equity goal. Reform aims not only to radically alter the main elements of the TRNC education system but also to improve the quality of education for every child.

Policy actors apply their own socio-cultural meanings to the reform goals. The vision for education might appear to be politically necessary and also widely agreed upon, in principle. Policy actors in the education sphere have various interpretations as to why the reforms are needed, and different understandings of the reforms are embedded in the layers of the education hierarchy. Among the rationales for reform initiatives, most frequently cited is simply a general need to keep up with changes. Kader, senior policy officer, states

There is a car that has a 1954 model engine. It is antique. Today, there are electronic and computerised systems. There are lots of changes and it is fundamental to keep up with these changes. This requires change.

This respondent suggests the major impulse for change is a fear of falling further behind other countries: he is driven by the same determinist discourse about globalisation and knowledge economies as his colleagues in the TRNC and elsewhere. However, all of the policy officials interviewed used a combination of local and global reasons for change: the need for skilful, democratic, peaceful, tolerant citizens who can operate within changing environments; combined with the need for citizens sensitive to socio-political issues in Cyprus and willing to work for the benefit of the TRNC community. The assumption is that this model citizen of the TRNC can and will be produced through education. To train such global citizens the education system must be reconstructed.

What kind of a community do we want to have in the future and what should citizens be like in this community? Future citizens should be democratic, respect



other people's ideas, knowing that ideas different from their own could also be right, and be able to work in teams. They should know how to get and use knowledge, how to learn and how to do research. They should think, question, and criticise. We want to create a community, which is capable of doing these. We are working to make this vision reality. We have to make this reality whatever it takes. (Selim, senior policy officer)

While a workforce able to operate within knowledge societies for economic gains is emphasized, the need to produce citizens who care about the TRNC and contribute to community development is stressed for community gains. Computer literacy, skills for lifelong learning, and linguistic literacy, are emphasised as the skills graduates need to compete within global knowledge societies. Learning about the TRNC is stressed as the basic prerequisite for community development. Selim explains further,

Students need to learn about their own geography, history, community. Education is the most powerful tool we have to make people care about their country and community. If we don't teach about our own country, how can we create citizens who want to live here and change it for better? Why should people want to work for a country they don't know and care much about? We should first love our country, our community to be willing to contribute to community development ....

This approach began to develop in the last five years. It is today's nationalism. It is to think about the ways you can contribute to your country.

But this is not simply a repeat of former Turkish Cypriot nationalism. Equally common is an expressed need to endorse a European orientation in TRNC education to harmonise the education system with the underlying principles of the European educational arena. The underlying principles of the European educational arena and recent changes in other countries have influenced the direction and the nature of the initiatives

The initial step was to identify things done in the world. There is a changing world. Knowledge is accumulated in larger amounts every day. Getting, using, and storing knowledge is becoming easier. Skills for managing knowledge are becoming more important. Bureaucracy is being replaced. People who can manage knowledge are in greater demand. In England, European Union and European standards are the symbol for such changes. Look farther and you find the states and a little farther Japan. These countries have reviewed their education systems in relation to these changes decades ago and now are questioning whether their current systems are appropriate for the knowledge society. We considered these, not to adopt recent changes and initiatives, but to create a system that is in harmony with these standards but appropriate to our context. (Selim)

On balance it appears as if policy actors in the education system share the government's vision for education. They bring global and local rationales together, position the latter as inadequate, and argue for sweeping changes, without specifying any evidence for their claim, or referring to any ongoing historical issues.

These reform initiatives occur in the context of public criticism of schools and former governments for their failures to provide high levels of the 'right' kind of education for all young children and young people. Large-scale criticism of schools is of course common in many jurisdictions (Levin, 1998). The negative climate of educational reform initiatives in the TRNC is as much blamed on former governments as schools, suggesting that it has as much concern with legitimization of the new government as it has with the tangible reforms proposed. The policy rhetoric is that schools have failed to improve in relation to educational developments happening across industrialised countries in general, and Europe in particular, because former officials failed. This kind of demonisation of prior

regimes, often carried out via the media, is a characteristic of contemporary governments and it can lead, as is the case in the UK, to substantial 'policy amnesia', as everything associated with former regimes is initially abandoned (Lingard & Rawolle, 2004). And the allocation of blame to specific policy actors can obscure the kinds of real ongoing and historically-derived challenges facing the country.

The negative tone of reform initiatives among policy makers was influenced by policy officials' experiences as teachers or administrators as well as formal and informal meetings carried out with teachers, head teachers and representatives of teacher unions. Research was not used about school and systemic problems to inform the allegations about past failure and present need. Although there are no opinion polls to show how widespread dissatisfaction with education is, fieldwork for this study suggests that it is relatively common although it might not be as robust as policy officials believe. Once again, the lack of an evidence base and research capacity is a serious weakness. Research (Datnow et al., 2002) into large-scale education reform suggests that systematic and critical inquiry by multiple actors operating at different levels of the system has benefits for the depth, longevity, and breadth of educational reform while lack of it negatively influences feasibility of reform strategies and thus the success of reform efforts (Stein et al., 2004).

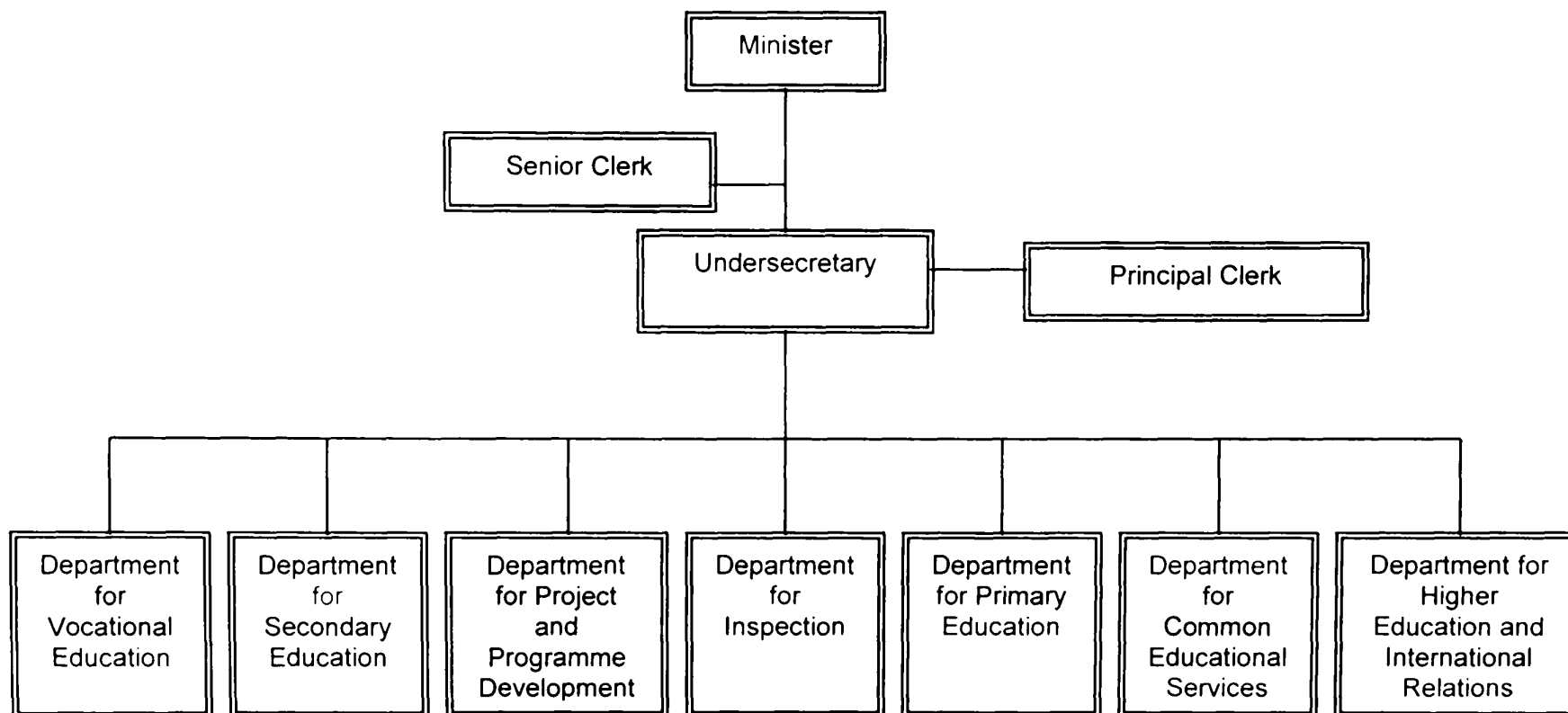
This is a good point at which to describe the current educational landscape in TRNC and how these reform initiatives have reshaped some of its key elements.

# TRNC Educational System

## System Leadership

The TRNC educational system is highly centralized with an entrenched bureaucracy. The Ministry of Education and Culture is the policy-making and administrative organisation of the government for education. It develops, designs and executes policies for syllabi, curricula, textbooks, and assessment, and regulates all educational organisations under its jurisdiction. The Ministry of Education and Culture is made up of a minister, a principal clerk, an undersecretary, a senior clerk and seven interrelated departments. Figure 1 illustrates the organisational structure of the Ministry of Education and Culture.

**Figure 1: Organisational structure of the Ministry of Education, exclusive of Culture**



Source: Ministry of Education and Culture.

The main responsibilities of the Department for Project and Programme Development are to follow the national and international educational developments and carry out research to develop the education system in the light of recent findings; to improve curriculum; to plan educational programs to be carried out in primary, secondary, high, and vocational schools in collaboration with the respective departments; to prepare textbooks, analyse the textbooks prepared by other departments, or make suggestions on what textbooks to buy; and to prepare educational laws, by-laws and regulations ("Talim ve Terbiye Dairesi (Kurulus, Gorev ve Calisma Esaslari) Yasasi", 2000). During the course of this study, efforts have been observed to make this process more collaborative. Policy officers have worked with committees of teachers, teacher union representatives, inspectors and experts from the Ministry. The objective is to allow for different opinions to be represented and diverse expertise utilised during textbook preparation, curriculum improvement and programme planning. Nevertheless, it has been found that the non-collaborative culture of the Ministry of Education and Culture often render genuine cooperation and mutual critical inquiry into educational problems and solutions almost impossible.

We persuade teachers and academic lecturers to take part in the committees. Teachers argue that 'academic lecturers cannot do this'; lecturers say 'these are school teachers, they do not know anything'. Can you manage to bring these two to work together on a common objective? They are very prejudiced. Our people have not learned to work together .... Prejudices make us unproductive. We also have such problems within the Ministry. Our inspectors say they could not work with teachers because they inspect them, because they are hierarchically above them. We also have problems with the unions. They come and shout. They have such an approach. (Selim, senior policy officer)

All state-maintained secondary and high schools, except those offering vocational education, are under the jurisdiction of the Department for Secondary Education; all

nurseries and state maintained primary schools are under the jurisdiction of the Department for Primary Education. The main responsibilities of these departments are listed in the Department for Secondary Education Law (50/1989) and the Department for Primary Education Law ("İlkogretim Dairesi (Kurulus, Gorev ve Calisma Esaslari) Yasasi", 1989). These are to: (a) ensure organisations under their jurisdiction offer education according to the pre-defined programs and pedagogical methodologies; (b) watch the work of the organisations under its jurisdiction and ensure cooperation among them; (c) identify the needs of these organisations and ensure these are represented in the ministerial budget; (d) take part in the preparation of the laws, by-laws and regulations relating to the organisations under their jurisdiction; (e) take part in programme development and make suggestions to this end; and (f) carry out the matters pertaining to personnel in state-maintained primary, secondary and high schools.

There is extensive bureaucratic correspondence between schools and the respective departments to ensure that the departments closely monitor the work in the schools and establish common practice among them. It is daily practice in schools to receive written instructions from the Departments in regard to new changes, permissions, and invitations. School management needs to announce these to teachers and follow their implementation through. School managers also need to seek permission before carrying out any activity in schools or any building improvement work, and inviting anyone to take part in these activities; they are also required to inform the respective departments about any such activity, school assets, attendance of the school staff, and overtime payments through four monthly reports.

You cannot believe how many documents we receive from the Ministry of Education and Culture. They send about 15-20 documents a day on average and this has increased recently. They tell you about the activities other organisations such as the Education Trust are organising. We also have to submit four or five

monthly reports to the Ministry and write to them about the activities we would like to organise to seek permission. If you are organising a day trip, for example, or careers fair or a seminar, you have to write to the Ministry explaining why you would like to carry out these activities and get permission in advance. If there are teachers who are not present in school because they are on leave of absence, you have to write to the Ministry to inform about this as well. All of this takes significant amount of time. (Ozgur, high school head teacher)

The Department for Common Educational Services was established in 1993. Among its main responsibilities are to: (a) plan and co-ordinate the in-service programme for state maintained school staff as well as ministerial staff in collaboration with other relevant departments such as the Department for Secondary Education and the Department for Primary Education; (b) carry out statistical analysis for the Ministry; (c) compile, file and interpret the statistical data available in the organisations under the jurisdiction of the Ministry; and (d) carry out research on the suitability of the classroom instruments and make recommendations on their improvement. The policy rhetoric is that in-service training courses are determined after a thorough examination of the demand from relevant stakeholders such as teachers, the Department for Inspection, the Department for Project and Programme Development. Cenk, a senior policy officer explains:

Usually, we use four methods to determine the topic of the in-service training courses. The first method is considering the requests from teachers, who apply to the Department stating the topics they would like to have training on. For example, ICT teachers might say 'the AutoCad program has been improved or changed, we want to have training on these new developments'. The second method is to consider the requests made by the Department for Inspection. These requests are often made depending on the needs identified during inspection. The third is the requests coming from the Department for Project and Programme



Development. They might want in-service training on textbook changes. And the fourth are the decisions we make as the Department. We might decide to offer training to support teachers to follow the new developments in the world.

Although the policy rhetoric is that different methods are used to determine in-service training courses, examination of the in-service training files from 2000 to 2006 did not reveal much reference to these methods. On the contrary, the general impression one gets is that majority of these courses were chosen by the Department. These courses fall under three categories, each having a specific objective. The first category is general courses that target majority of the school staff. These are English and Computer courses with the aim to enhance teachers', senior managers', and ministerial staff's English and Computer skills and are offered every year. The second is subject specific and is offered to teachers teaching specific subjects such as geography, history or science. These courses concentrate on enhancing teachers' pedagogical knowledge or focus on new subject-specific developments and different methods of using new textbooks. The third category is more general and concentrates on topics that would interest the majority of the teachers and senior managers. These include such courses as student psychology and motivation. The Department works with non-governmental organisations to deliver some of these courses. The majority of the courses are offered to teachers and a very small number is organised for school managers and ministerial staff.

In-service training courses are further divided into two as courses taking place in TRNC and those happening abroad. While teachers mostly attend courses in TRNC, it is also common practice for some to attend courses in Turkey annually. The education protocols of 1987, 1991, and 1995 reiterate that as part of the agreement to enhance cultural and educational exchange, Turkish and TRNC authorities shall invite each other to attend conferences, seminars and workshops. Each year, Turkish authorities send the Department for Common Educational Services a list of courses scheduled to take place in

Turkey and invite the Department to send teachers, senior managers and ministerial staff to attend these courses. These in-service training trips are fully funded by the Ministry of Education and Culture and policy rhetoric claims that applicants need to fulfil three criteria to qualify for the bursary. First, they need to be in public employment; second, they need to have attended the in-service training courses on specialist subjects in TRNC; and third, they need to agree to prepare a report upon their arrival in TRNC (OEHD 9/89). Examination of the in-service training files, however, revealed no evidence in the form of a certificate or a list of courses applicants had provided. While interviews held with policy officers confirmed that neither a list of courses nor a list of the attendees is available, interviews held with head teachers verified that they have not kept the certificates of attendance issued by the Ministry of Education and Culture since they had never been asked for them. This causes reasons for concern that what is preached by policy officers might not be practiced.

Courses are announced to schools through the Departments of Primary and Secondary Education, which are informed by the Department for Common Educational Services of each course in writing. The Departments for Primary and Secondary Education are required to inform the head teachers in writing, who must make the necessary announcements to relevant teachers or senior managers. Often, this is done without the use of fax or email using postal services, which can take up to 3 or 4 business days to deliver standard mail. It is also common practice to use a porter for delivery to places close to the Ministry of Education and Culture. This is an entrenched and exceedingly slow bureaucratic procedure that leads to waste of human capital and office supplies. Particularly because the postal service is not reliable, it is also common for deliveries to be lost or arrive late. In 2003, a proposition was made from the then Director of the Department for Common Educational Services to the Undersecretary to improve this procedure

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4 June 2003

I suggested in the meeting held on 2 June 2003 that the Department for Common Educational Services directly contact schools on matters regarding in-service training. This suggestion was rejected by some head teachers who claimed that such a procedure would be illegal. During the meetings we had with our legal advisor, it became clear that there are no legal barriers. Changing the current procedure to the one suggested would:

- a. stop the waste of human capital
- b. decrease the waste of office supplies
- c. speed up the slow and bulky bureaucratic structure
- d. eliminate the risk of forgetting to announce in-service training activities of which we have had many examples in the past
- e. eliminate the risk of late announcement of in-service training activities of which we have had many examples in the past

This new procedure, which has many advantages and no disadvantages, could easily be announced to the schools by a notice sent by you and could easily be implemented in the forthcoming academic year.

(Oben, the then Director of the Department for Common Educational Services)

Given the fact that this procedure is still in place, there is no doubt that the suggestion of the then Director has been rejected by more senior policy officials in the Ministry of Education and Culture. The Commission for Inspection, Evaluation and Improvement replaced the then Department for Inspection in 2006 with the Inspection, Evaluation and Improvement Law made in 2006 to follow the latest developments in the world, in

particular in the European Union.

Changes and developments we observed in the world, in the member states of the European Union in particular, demonstrated the need to consider this new approach when we plan for the new law. When we examined the examples more closely, we realised that commissions are preferred to departments in the countries that give weight to education and that there is a central commission, a district commission and smaller school-based commissions. This structure supports team work rather than a highly hierarchical structure that allows for mandates. This showed us that we need to work towards a similar system and we made a law that allows us to do so. When this law is made, the name of our department changed. As it is clear from the new name of the department, one of our main aims is to move from an emphasis on inspection only to inspection, evaluation and improvement. (Turkey, senior policy officer)

One other important reason for changing the inspection system was to enhance the capacity of the Department and to improve education in the schools under the jurisdiction of the Ministry of Education and Culture. A proper inspection mechanism has not been in place for a significant period of time. There is unequivocal agreement among the participants that this has caused the quality of education to deteriorate over time, a problem that could not be addressed by a Department lacking capacity. This assumes that inspection is necessarily a good thing.

In time the number of permanent staff working for the Department for Inspection decreased. I remember when I was a child, schools offered whole-day education with social, cultural and educational activities in the afternoon. In time, the number of afternoon classes decreased, the length of classes decreased, and we moved towards test-based education. The Department for Inspection also failed to

establish and maintain effective control mechanisms to ensure continuous school improvement. Eventually, correspondence between the Ministry and schools involved only routine things. Schools send the Ministry their educational programs, average test results and such, but the Ministry does nothing with this information to support schools to improve their standards. I do not want to blame anyone, but this vision could not have been established in the past, and we are still dealing with serious consequences. (Turkay)

It has been found that one of the changes to be made was to recruit new inspectors and to restructure and reculture the Department. Previously, there were only about five inspectors working for the Department, a number not big enough to carry out inspection in schools let alone support them to improve their standards. Interviews carried out with the head teachers confirm Turkay's observations.

Because the inspection mechanism does not work properly, no one knows what is going on in the schools, in particular in the classroom .... When I carry out observations in the classrooms, I examine whether students take proper notes, whether they are given sufficient homework, but the truth is teachers are not inspected properly in the last 10-15 years. It is not clear what teachers do in the classroom. As you know there were only one or two inspectors dealing with secondary education. Since I became the head teacher, an inspector visited the school only once. I have been working in this school for twenty-one years, no one came to inspect me when I was a teacher and I do not remember an instance when another teacher was inspected. There might be several instances when inspectors visited the schools, but they did not carry out inspection or supported us to improve the standards as you would expect. There might be teachers of fifteen years who have not yet met an inspector. There are three parts to the inspection reports. The first is completed by the head teacher and the second part

by the inspector. What we do is not that scientific as well because I observe the teachers outside the classroom. No one knows what they teach, how they teach, which pedagogical methods they use. (Ozgur, high school head teacher)

That a small number of inspections was carried out was only part of the problem. A more serious problem was that the inspections did not carry much weight for school staff once they had been permanently appointed.

You know teacher inspections were considered seriously only during the first two years of teacher appointment to decide whether teachers who have completed first two years in the post, or school managers who have completed their first year in the post, were to be offered permanent positions. Beyond this, negative inspection reports were only considered during promotions. It would be sufficient not to have received any negative inspection reports for someone to be promoted to a senior position; however having received very good inspection reports or be very successful were not sometimes enough for that person to be appointed to the position they deserved. It would be wrong to say that inspection reports had much weight during promotions or to argue that teachers' and managers' strengths and weaknesses were truly represented in these inspection reports since mid-1970s .... There are lots of instances when lots of things were found unsuccessful in a school particularly because of management, but nothing was done to improve things. I mean even though it was recorded that some managers have very serious weaknesses, they were not affected in any way. There were very serious gaps. (Turkey)

Interviews conducted with head teachers revealed that the lack of an effective inspection mechanism and performance management system has led to significant pitfalls in the education system. Coupled with lack of a pressure and support system to improve

teaching and learning and lack of capacity to distinguish between the schools that are successful and those that do less well, this has resulted in chronic problems. Head teachers underline that this situation demoralises them and leads to lack of motivation for improvement among the school staff.

This affects me negatively. We try our best without knowing what our objectives and standards are. If you ask any head teacher, they would say they are very good and that their schools are very successful. But there must be some standards and schools must towards these standards to be able to improve teaching and learning. We don't have any. Everyone tries to do something and things what they do is the best. It is an everyday practice for the Ministry to send mandates, but they do not inspect how well these are implemented or how much of it is implemented in practice. This is very wrong. (Ozgur)

I am very sorry to say this but schools are currently unowned and left to the conscience of teachers and school managers. Good teachers and managers do their best, but less successful ones also survive in this system. No one does anything about this. Our seniors are not as sensitive as we are because they do not want to offend anyone. And now, there are only a few inspectors. They recently recruited 11 inspectors for primary education and these are now in training. We have not had an inspector in our school in the last five or six years. (Erdogan, primary school head teacher)

According to the new plan ("Milli Egitim Denetleme, Degerlendirme ve Yonlendirme Kurulu (Kurulus, Gorev ve Calisma Esaslari) Yasasi", 2006), the commission will be made up of a Supreme Commission, District Commissions, and School Commissions. The Supreme Commission will be formed of a president, a vice president, chief inspectors and five inspectors; each District Commission will be formed of a chief inspector and inspectors

appointed by the Ministry of Education and Culture as well as the representatives from district schools and from School Parents' Associations; and School Commissions will be made up of the head teacher, deputy head teachers, department heads, teachers, a representative from the School Parents' Association and a representative from one of the Teacher Unions.

The main duties of the Supreme Commission are to co-ordinate and enforce inspection in the schools under the jurisdiction of the Ministry of Education and Culture, to inspect teachers and managers in the schools and prepare reports on their effectiveness, to support teachers and managers to enhance their effectiveness, and to support the Department for Common Educational Services in identifying appropriate in-service training courses for teachers and school managers. Among the main responsibilities of District Commissions are to plan, schedule and carry out inspection in the districts according to the directions of the Supreme Commission, to identify the problems and the priorities unique to each district and support the Supreme Commission to solve these, and to enhance the collaboration among the schools in the district and make suggestions to the Supreme Commissions on how the resources in these schools could be used and shared more effectively. School Commissions, on the other hand, are expected to schedule and carry out self-evaluation in schools as well as evaluate and improve the self-evaluation procedures used, to evaluate whether educational activities carried out in schools are compatible with school improvement plans, and to report their evaluations and observations to District Commissions.

The Department for Higher Education and International Relations is responsible for co-ordinating and managing the educational and administrative activities relating to higher education, co-ordinating and managing the merit and needs based scholarships, and contribute to the planning activities on merit-based scholarships to reflect the workforce needs.



## **Appointments, Transfers, and Promotions**

Appointments, transfers, promotions, and discipline of all teaching staff are controlled by the Public Services Commission, a five-member body appointed by the President of the state for a period of six years ("Kamu Hizmeti Komisyonu ve Dairesi Kurulus, Gorev ve Calisma Esaslari Yasasi", 1983). Those applying for public employment must undertake a two-tier application process comprising two written examinations and an interview since the Public Employment Examination By-Law was executed in 2005 ("Kamu Gorevileri Sinav Tuzugu", 2005). The first part is made up of two written examinations. The first is the proficiency exam comprising multiple-choice questions on the constitution, public employment law, current issues, TRNC history and geography. Candidates who achieve 60 out of 100 at the proficiency exam are entitled to sit for the second part of the written examination, which tests whether an applicant is equipped with the skills and the knowledge required for the position. The Public Services Commission prepares a list of successful applicants made up of those scoring 60 out of 100 in the second part of the written examination. Only as many people as there are openings are selected for an interview, which is carried out by the Public Services Commission. During the interview, two observers must be present, but they are not entitled to interfere or evaluate the applicants. Recruited candidates do not have the right to make a decision on where to work and are appointed to a school chosen by the Public Services Commission.

Once newly appointed teachers have worked in the school they have been allocated to, they are relocated at will and transfers are conducted according to the Employee Transfer Order, which allows teaching and managerial staff to make preferences as to the districts and schools. A list is compiled and transfers are conducted on a "first-come first-served" basis by the Public Services Commission. Primary- and secondary-education teacher unions oversee this process to ensure a fair mechanism. When teachers apply for promotion, the same procedure repeats itself.

Staff can not move from one school to another as and when they wish. We have transfer lists. At the end of the academic year, staff state which district and school they want to be relocated at. For instance, I might want to move to school X in Nicosia and my name is on the list. Those who wanted to move to the same school before me are in front of me on the list and those who made the same preference after me are behind me on the list. I have to wait. I can move to the school of my preference if there is a vacancy to be filled (Aylin, primary school head teacher)

Candidates who are already in public employment but applying for a more senior position are required to take a written examination prepared and administered by the Public Services Commission since 2005, which is discussed in more detail in Chapter 5.

## **Structure of the Education System**

Education is divided into three: compulsory education, further education, and higher education. Formal education is compulsory and lasts for 10 years; statutory schooling ages are between 5 and 15. The Ministry of Education and Culture decides which school a child should attend during compulsory education and provides free transport for those who attend schools outside the village or town where they reside ("Zorunlu Tasimacilik Tuzugu", 1986). At the time of the study, the number of the secondary and high schools receiving students from outskirts were 24, equivalent to 77 per cent and the number of the primary schools were 50, equivalent to 57 per cent.

Compulsory education is divided into reception for pupils aged 5-6, primary education for pupils aged 6-11, and secondary education for pupils aged 12-15. Children completing primary school are granted a "Certificate", which lists the child's academic strengths and areas of interest. With this certificate, they transfer to secondary school at the age of 11

without an entrance exam. All secondary schools under the jurisdiction of the Ministry of Education and Culture are comprehensive and do not require a selective entrance exam. They all follow the same curriculum and use the same textbooks. At the age of 11, children start to take English as the second language along with either German or French. Apart from modern foreign languages, instruction is in Turkish at the age of 11. Children achieving a satisfactory level of English by the age of 12 can choose to study Mathematics, Science, History and Geography in English. The English program is offered in ten secondary schools only. In secondary schools, children also take elective courses chosen in consultation with their teachers and parents. These courses aim to guide children to follow further education programmes that are appropriate to their abilities and interests.

Further education is divided into four: multi-programme modern high schools; vocational high schools; colleges and Anatolian high schools; and fine arts high schools. At multi-modern high schools, the duration of the high school programme is three or four years depending on the programme and the language of instruction is Turkish. These schools offer specialisms in Science, Social Studies, Foreign Languages and Turkish-Mathematics and aim to prepare students for universities in Turkey. Vocational high schools follow Turkish or English-based programme for a duration of three or four years. Fine arts high schools offer programmes that last four years. The main aim of the colleges, which offer English-medium instruction, is to prepare students for higher education abroad. They run GCE and IGCSE programmes along with Science, Social Studies, Foreign Languages and Turkish-Mathematics programmes to prepare students for university entrance examination required for acceptance to any university in Turkey. To transfer to IGCSE or GCE programmes, students must study Academic English from age 11 to age 15. GCE and IGCSE programs are offered only in Colleges. With the exception of Iskele, there is one college in every district offering students the opportunity to study for GCE and IGCSE programs. At Anatolian High Schools, English-based instruction is given. There are also

four independent colleges requiring a selective entrance exam. These offer English-medium instruction. Like state-maintained colleges, they prepare students for higher education abroad and run GCE and IGCSE programmes.

One of the critical and most controversial changes made to the education system was to do with state-maintained colleges. Previously, colleges had both junior and senior secondary schools operating on selective basis, both secondary and high school offering English-medium instruction. They used to select all of their students based on academic ability, placed as determined by the annual centrally administered entrance exam. Each college used to have a quota to take the top achievers in the exam. Students used to sit for the entrance exam when they finish primary school and it was very common practice for most of children to take private lessons to prepare for the college entrance exam. The current government condemned this system as being highly elitist soon after they came to power and abolished the college entrance exam to move towards a more democratic and comprehensive system and away from test-based learning, which was a reality in most primary schools. This move was not well received by many parents and the new government was widely criticised for hijacking a system that provided young people with the opportunity to obtain good education through merit rather than family income. There is widespread public opinion that abolishing the college entrance exam at age of 11 and eradicating secondary part of colleges would not allow young people wishing to study abroad to be equipped with English language skills to follow the GCE or IGCSE programmes in the high school unless they take private lessons to complement school education. Although no statistics are available, there is widespread belief that this move has led many primary children to compete for limited places in private colleges and to a dramatic increase of demand in private lesson industry.

There are 87 primary schools educating 15648 children, and 31 secondary and high schools educating a total of 14052 students. Tables 3 and 4 show the distribution of the

schools according to district and provide further details as the number of teachers and senior managers.

**Table 3: Primary schools according to district (2006-2007)**

Districts	Number of schools	Number of students	Number of teachers	Head teacher	Assistant head teacher
Nicosia	19	5114	339	17	29
Guzelyurt	12	1869	154	12	8
Gazimagusa	30	4087	342	25	16
Iskele	13	1515	130	7	7
Girne	13	3063	213	13	15
<b>Total</b>	<b>87</b>	<b>15648</b>	<b>1302</b>	<b>74</b>	<b>75</b>

Source: Ministry of Education and Culture

**Table 4: Secondary and high schools according to district (2006-2007)**

Districts	Number of schools	Number of students	Number of teachers	Head teacher	Acting head teacher	Assistant head teacher	Deputy head teacher
Nicosia	11	5600	572	11	0	38	5
Guzelyurt	4	1855	180	2	1	12	1
Gazimagusa	8	3436	341	7	1	18	3
Iskele	4	1276	142	2	2	3	1
Girne	4	1885	176	4	0	10	2
<b>Total</b>	<b>31</b>	<b>14052</b>	<b>1411</b>	<b>26</b>	<b>4</b>	<b>81</b>	<b>12</b>

Source: Ministry of Education and Culture

The number of the teachers in state-maintained primary, secondary and high schools depend on the number of students schools accommodate. The details are set in the Teachers Law ("Ogretmenler Yasasi", 1985). Primary schools shall have a teacher up to first 35 students and further teachers for each further 30 students while secondary schools shall have a maximum of 40 students in each group and a teacher shall teach a maximum of 250 students. Primary schools that have a maximum of four teachers shall have a responsible teacher, who acts as the head teacher; those that have five or more teachers shall have a head teacher; and those that have 8 classes or more accommodating up to

300 students shall have an assistant head teacher with another assistant head teacher for the next 200 students. Schools that have a minimum of four assistant head teachers shall have a deputy head teacher. Every secondary and high school regardless of its size shall have a head teacher and an assistant head teacher for every 200 students. In addition, each secondary and high school shall accommodate sufficient department heads to allow educational activities to take place effectively and schools that have a minimum of four assistant head teachers shall have a deputy head teacher.

Higher education is given high priority by residents in the TRNC and a large number of students undertake undergraduate and postgraduate studies in TRNC and beyond. Among the most common foreign destinations are Turkey, UK and USA. The higher education sector in the north has also grown fast to reach eight universities. The total number of students studying in these universities in the 2006-07 academic year was 40,687. 25.4 per cent of these were from TRNC, 67.2 per cent from Turkey, and 7.4 per cent from other countries. The biggest of these universities, Eastern Mediterranean University, is a state-trust university established in 1979 as the Institute of Higher Technology and later transformed into a university in 1986. In the 2006-07 academic year, it accommodated 34.9 per cent of the whole university student population. Of these, 27.3 per cent were from TRNC, 61 per cent were from Turkey and 11.7 per cent from other countries. The university maintains close relationships with partners around the world and offers internationally accredited programmes.

## **School Organisation**

School organisation varies depending on a number of factors including age group and type of school. Schools have some flexibility in devising the timetable and arranging the school day. There is, however, significant consistency among schools, as each has statutory Ministry of Education guidelines to follow in regard to the academic year, and the

school day. Under the guidelines of the Ministry of Education and Culture, all schools operate a two-term school year with a two-week spring break. Each academic year starts on 1 September and ends on 30 June. The first term takes place between September and January and the second runs from February to June. Schools cannot divide the school year differently and cannot change the length and the date of the holidays. In primary, secondary and high schools, the school day starts at 07:55 with a ceremony during which students sing the national anthem and the head teacher makes a short speech, and finishes at 13:05. Children and young people have six classes every day, each lasting 45 minutes, and two breaks lasting 40 minutes in total. There is legal requirement for the school management to offer afternoon programs from 14:00 to 15:30 on Mondays and Thursdays. The content of these programs are decided by the school management, who can also organise out of school hour educational activities to be held in the afternoon other days of the week if they so decide. While it is usual for primary schools to organise activities such as scouting, chess, knitting, sports, modern dance and arts, secondary and high schools often concentrate on more academic activities such as extra maths or English classes. Esra, a secondary head teacher explains,

We have three types of courses, two of which are supplementary classes. The first type of supplementary classes are determined depending on the demand and the needs of the students. We ask students to fill a form to determine which classes they would like to have. Every year, English and Maths are the favourite subjects. Students take these classes in the afternoon to increase their results and to improve their English, which is in demand because it is the foreign language in request. These classes are subject to payment. Students pay around £3.50 for each class, equivalent of £14.50 a month. The second type of supplementary classes is English classes, which helps students prepare for Cambridge and Anglia examinations. These are also subject to payment and cost approximately £24 a month. Finally, we have classes that are competition

oriented. We have general knowledge and maths competitions among secondary and high schools. These classes are for successful students selected by teachers to participate in these competitions. These classes aim to support these students to prepare for these competitions. They are cost-free.

Interviews carried out by the head teachers reveal that in most schools afternoon classes are limited to two days only.

There are legal expectations that primary school teachers will teach between 20 and 25 classes a week each lasting 45 minutes while secondary and high school teachers will teach between 13 and 20 hours depending on the seniority. When teachers are requested to teach or supply teach extra classes, they are paid overtime. There are also expectations that primary school teachers will carry out the duties assigned to them by the Ministry of Education and Culture, the head teacher, the assistant head teacher or the responsible teacher; secondary and high school teachers are also expected to carry out educational, cultural or social duties assigned by the head teacher. However, it is not specified how many days or hours teachers shall be available in any school year. Lack of this detailed description allows for different stakeholder interpretations, often leading to blocking, hindering, or obstruction of an opposing stakeholder. World Bank (2006) has found that comparing teachers' net teaching time in the TRNC to those in OECD and EU countries offers a bleak picture. The comparison clearly demonstrates the relatively low teaching load of secondary school teachers who enjoy a teaching load of maximum 20 lessons a week. The evidence shows that teachers with maximum teaching load teach 412 hours in comparison to their peers in the RoC with an average of 840 hours annual net teaching time and to their peers in the OECD countries with 701 hours annual net teaching time.

The quantity of education is a very real concern that has also been recognised by World



Bank in a recent report (World Bank, 2006a). Analysing the inputs in comparison to other European Union members reveals that it is critical to address this issue. The World Bank demonstrates that TRNC rates last in terms of the number of instruction days and number of hours of net teaching times and concludes that,

Compared to their EU peers, Turkish Cypriot students completing 8 years of education have actually completed only the equivalent of 6.6 years of education in Europe based upon the number of instruction days they have had (The average length of a school year in the EU is 20 percent longer compared to that of the TRNC.) Moreover, if the length of the school day were to be taken into account, the number of equivalent “years” of education would fall even further. (p. 24)

This issue was also raised by participating head teachers who emphasised that moving to full-day education would significantly enhance the quality of the education in North Cyprus.

## **Conclusion**

This chapter has examined the reform agenda within its socio-political context. Findings have shown that policy makers see school reform as the key means of establishing a more balanced economy less reliant on Turkish financial assistance. Also integral to the schooling agenda is a nation-building approach, which is both ‘European’ and ‘Turkish Cypriot’. The chapter has argued that financial and demographic issues combine to make education reform difficult, with specific challenges arising from the mixed commitment of the workforce, the capacity of the education bureaucracy to align support with policy mandates, and the ‘fit’ between policy and local needs. I next focus on leadership capacity, an aspect of the education bureaucracy identified as one of the challenges in this chapter. I put particular emphasis on building school head teachers’ capacity to lead

instructional development and organisational improvement as well as improving the system capacity to support them to undertake this role effectively.

# Chapter 4

## Methodology<sup>7</sup>

### Introduction

This chapter discusses my research methodology for this thesis. It consists of four sections. In section 3.2, I explore the two-way management and negotiation of identity and its effect on my access to research participants and research sites, and on data gathering. I argue through numerous examples that the participants and I were actively engaged in identity crafting, which eventually influenced the data-gathering process and the intersubjective narratives of our lived experiences in social worlds. In section 3.3, I focus on research ethics, where I explain the precautions I took to respect the rights of the participants. Section 3.4 concerns the knowledge production work, where I discuss the research design, the research methods employed, the selection of research participants, and the means of data analysis.

### Identity Work

A Turkish Cypriot myself, I am an insider provided with advanced inside knowledge of Turkish Cypriot culture, historical developments, political and social structures in the TRNC. This advanced knowledge comes from lived experiences; my emotions are products of my background. My positionality comes with power, but not with the ability to paint a fully developed picture. My partiality is undeniable. It is informed by ever-changing historical culture and my partial stance in relation to it (Clifford, 1986; Rosaldo, 1993). On the other hand, since I am not a member of the institutions I investigate, at another level, I am an outsider. I lack the knowledge available to those embedded in these organisational cultures. During the research process, my positionality shifted and the boundaries blurred

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<sup>7</sup> An article informed by this chapter was published in 2007 (Mertkan-Ozunlu, 2007).

as the study progressed. This multiplicity of selves, judging status on a continuum in relation to the phenomenon studied, is critical, and shifting positionalities and blurred boundaries are the realities in the field (Atkinson, 2001; Brayboy, 2000; Chaudhry, 1997; Christensen & Dahl, 1997; Deutsch, 1981; Labaree, 2002; Mullings, 1999; Sherif, 2001).

In the summer of 2004 I visited the TRNC Ministry of Education and Culture to discuss with the relevant director my interest in investigating reform initiatives. This meeting was critical, since permission to carry out research with planners of education and state-maintained schools must be granted by the Ministry prior to the start of any research. Having presented myself as a doctoral student studying educational leadership and specialising on large-scale education reform, I defined myself as a doctoral researcher willing to learn about planners' experiences of large-scale reform. Since this initial meeting, however, the director has come to see me from a different angle and has positioned me differently. This was due to my privileged educational background abroad and my five years of teaching experience in higher education. The following field notes represent my thinking around the reasons for these assumptions:

*My MPhil in Teaching and Teacher Education from the University of Cambridge must have influenced the construction of these assumptions. So must have the lack of human capital in the country. Accounts of the difficulties caused by lack of well-trained human capital were often made by policy makers. Accounts of the difficulties resulting from previous governments' recruitment policies were also not uncommon. Among these accounts were those made by civil servants employed for their political views rather than their knowledge and skills. Policy makers' identities in this context were defined by these difficulties and were constructed as depowered by previous policy actions. (field notes)*

I was invited to have a more insider position than my positionality at the time permitted. Accepting the request would help to establish good relationships and provide the opportunity to help; denying it without any acceptable reason would decrease my chance to do so, inevitably affecting the research project I was willing to carry out. I accepted the offer and was positioned as a professional researcher learning about policy while helping policy to take shape. I would later not be able to deliver training sessions due to my limited time in the TRNC, but would appear on the television upon request to talk about a topic policy makers wanted to emphasise: student-centred learning, and teaching students how to learn.

While working in policy settings at the time of the study, I could not avoid discussing socio-political dilemmas, which the next chapter discusses in more detail. It was the topic of most interest. I had participated in protests, together with those that were in power at the time of the study, and had voiced political views slightly on the left during the initial meeting I held with the planners. Conversations around my political ideas played a significant role both in the construction of my identity by the participants, and on my crafted identity in the body of this research project. I was imagined to be in the same or a similar political camp as the planners; I was considered as a politically unthreatening researcher to support and confide in. This is illustrated in the following experience.

One of the public policy dilemmas voiced by policy makers was demographic changes and their impact on education, discussed in greater detail in the next chapter. Having grown up in the TRNC, I was fully aware of how difficult it would be to look into demographics on the island – migration from mainland Turkey has long been among the most controversial issues, long used by opposition parties to attack those in power, and research into migration was not traditionally welcomed. I was interested in exploring the schools most influenced by demographic fluctuations, which could easily put me in a threatening position. I was only partially right, as the following journal entry demonstrates:

*Not to my surprise, the director admitted that it would not be very easy to get permission to carry out research in schools and that even through the study would lead to important insights, he was not authorised to give me the permission to look into schools without consulting other directors and experts for primary and secondary education. I was also warned that getting the informed consent of the interviewees would be difficult due to the sensitivity of the topic. (Journal entry)*

Getting the permission from the Department of Secondary Education was uncomplicated. My experiences with the Department of Primary Education were not, however, as straightforward. The following field note demonstrates:

*As soon as I handed in the interview themes, I was approached by one of the experts. He said I needed to submit a highly structured interview agenda to get the permission sought. He insisted this was to prevent me from focusing on politically inappropriate themes. I was very reluctant to do so. I do not believe structured interviews are most suitable to gathering in-depth data on experiences of daily life. After some discussion, I was told to wait while the expert talked to the director in private. I felt at a crossroad. I would either stop here or switch to an interview type that would not be appropriate to the research objectives. About ten minutes later, the director came back and I was informed that I could do the research and that he would take the responsibility for granting me the permission to do so. At that moment, I better understood the burden and the responsibility I had had on me and the significance of the gift I had been given by the director.*

Perceived as unthreatening by the director, I was however a threat to the expert working in the same organisation. As Walford (2001) argues, discourses around my political views and 'shared experience' were significant in the construction of my identity as a threatening researcher to be monitored closely or an unthreatening one to be confided in. The initial

meetings and interviews helped to establish a degree of trust and comfort (Corbin & Morse, 2003).

Another 'critical incident' that demonstrates the importance of identity work took place during interviews with head teachers. My identity in this context was defined primarily as a researcher willing to understand practical realities within schools. During these interviews I was treated very differently and was positioned as someone expected to challenge planners of education with her findings and to impact policy, as the following account illustrates:

*Doing interviews in schools like ours is very important for us, for the country and for our future. Most people think we over exaggerate when we say these things, but we see the reality from inside. If migrants from mainland Turkey, such as the ones situated around our schools, are going to stay on the island and live with our people, some serious work on the issue must take place. I hope your research will guide some people to do so (Demir<sup>8</sup>, primary school)*

As is clear from 'most people think we over exaggerate when we say these things, but we see the reality from inside', in this context I was positioned as an outsider who could listen and learn about the realities of people working in these schools. My identity was constructed as a researcher sensitive to socio-political concerns in the north and skilled to represent these inside realities of the interviewees to inform policy.

Earlier research has shown that identity work is an important part of the research process (Cassell, 2005; Warren & Fassett, 2002). Identities are crafted out of a dialogic relationship among the researcher, respondents, and the context. Identities are viewed differently by different people in different places at different times, and different scripts for

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<sup>8</sup> The study has been anonymised to protect the identity of the participants. All the names used are pseudonyms.

a self can be written by different people involved in this process (Baker, 2004; Cassell, 2005; Coffey, 1999; Crotty, 2003). Self-defined identities can differ from the ones constructed by others and the positionality intended might differ from the positionality constructed. Any impersonisation of the second consciousness essential for viewing oneself from the perspective of another is socially constructed, through which many voices of one's culture, experiences and feelings are heard (Morson & Emerson, 1990). This identity work influences the narratives crafted in the research process and leads to the placement of the self in narratives in ways that are socially more acceptable and sympathetic (Measor, 1985; Sikes, 2000). Being highly skilled and experienced in self-presentation and narrative crafting, elites find it easier to represent themselves in socially acceptable ways (Ozga, 2000; Ozga & Gewirtz, 1994). Where elites are involved, identity work becomes more significant, particularly in the knowledge gathering process.

Initial analysis of the study presented public sector capacity as a critical challenge that needs to be addressed to make the reform vision a reality. Understanding the reform initiatives at the policy level helped me refine my doctoral research to focus on one of these challenges in particular – building leadership capacity for large-scale educational reform. In September 2005, I visited the Ministry of Education and Culture to discuss refocusing the study on leadership capacity building for systemic reform with particular emphasis on: (a) redesigning the domain of headship along with the system infrastructure to reposition head teachers as leaders of organisational capacity building, and (b) developing the capacity of head teachers to effectively take on this challenge. This move was welcomed and I was assured that the findings would be invaluable to policy makers. I reapplied for permission to conduct more interviews with head teachers and policy makers and was granted the permission in June 2006<sup>9</sup>. Contacts I have established during the initial stages of this study and my research identity co-constructed in the field eased the

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<sup>9</sup> See Appendix B for the permission letter submitted to the Ministry of Education and Culture and for permissions granted from the departments for Primary Education and Secondary Education.



process.

## Ethics

Focusing on education in TRNC has presented context specific challenges that I needed to address while still ensuring that my research complied with the ethical guidelines of the University of Nottingham<sup>10</sup> and more widely with the ethics guides produced by the British Educational Research Association. These challenges were mainly the consequences of TRNC being a small state with a small population size of around 250 000. In TRNC, it is often the case that people know each other relatively well in comparison to states with a larger population size. Extended knowledge of people about one another presents an increased risk of identification and in cases where participants take a critical stance towards people in power, increased risk of identification presents an increased professional risk for participants because professional prospects depend to a large extent on relationships at personal level. Hence, protecting the identity of the participants was relatively more important and yet more difficult in the context of my investigation. To protect the identity of the participants, the study has been anonymised and only pseudonyms have been used. In cases where the place names or professional details, such as the position or the department in the case of the Ministry staff, could reveal the identity of the participants, such information has also been deleted. This was particularly important in the case of the TRNC because it is a small state with a very small population size.

It is also the case that different rules apply to research in TRNC. This necessitated that I find out what was required locally and cater for context-specific rules to ensure my research was ethical in the context of my investigation. This research was approved by the School of Education, University of Nottingham and permission to carry out the study

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<sup>10</sup> See Appendix C

was obtained from the Ministry of Education and Culture, TRNC before approaching participants. Within the context of TRNC, no study can be carried out within schools without the permission of the Ministry of Education and Culture and it is often the case that participants demand to see the permission letter before they agree to participate in any study. That the standard research instrument the Ministry of Education and Culture expects researcher to employ is a questionnaire caused some difficulties. A letter giving detailed information about the project was presented to the Ministry of Education and Culture whilst seeking permission to carry out this study (Appendix B). Additionally, I was asked to fill a standardised research permission form used by the Ministry, which is based exclusively on quantitative methodology that uses questionnaires as the main research instrument and does not accommodate any other methodology, in particular interviews. In the absence of recognition of qualitative research, I had to explain why I have chosen a particular methodology, what themes I would focus on during interviews and why the chosen methodology was appropriate before the permission was granted. I also had to persuade the policy officers that my inability to provide a full disclosure of my interview questions was not to do with my desire to hide the questions from them, but mainly because I genuinely did not have all of the questions as most would be formulated during the interviews.

The principle of informed consent also was followed closely and applies to all participants who volunteered to help in this study. The project outline sheet (see Appendix E) was used to explain the following to the participants:

- The objectives of the study
- The researcher who will undertake it
- The time that is required from the participants
- The nature of the participation
- The people who will have access to the data once it has been generated

- The means through which the anonymity of respondents will be protected
- The means through which the research findings might be disseminated

Gray (Gray, 2004) has suggested that it is important to include this information when seeking informed consent. Each participant was asked to sign an informed consent form once they had been briefed on the project before they participated in the study. In developing the project brief, the letter asking for the permission of the Ministry, and the informed consent form, ethics guides produced by the British Educational Research Association were used. In accordance, participation to the study and answering of any questions were voluntary and the participants were given the right to withdraw from the study at any time if they so wished with no requirement to explain their reasons to do so. The collected data was kept on the researcher's computer only and was shared only with the project supervisors.

## **Knowledge Production**

To achieve its objective, this study addresses the TRNC reform strategy by: (a) exploring the local context in which it was planned and introduced, with particular emphasis on the socio-economic situation on the island and the local challenges and dilemmas these created at the time of the study; (b) the objectives of the reform agenda as well as the form it took and why; and (c) the domain of headship and the means through which the capacity of head teachers were developed in the context in which the reform agenda was introduced. Using the research findings, I then make suggestions as to how headship needs to be restructured and recultured for education reform to be realised in the TRNC and how the professional development opportunities for head teachers could be improved, along with the external infrastructure, to build leadership capacity and provide a context in which enhanced leadership capacity can be practiced. It does so by critically engaging with the international literature and the local context.

The study employs a mixed-method design with an inductive drive where the qualitative paradigm has a dominant and the quantitative a supplementary status. The qualitative core forms the theoretical foundation and the information obtained using other strategies embellishes the study. The inductive drive of the research makes it relevant to employ a qualitative paradigm as the theoretical foundation (Morse, 2003). Mixing of the data occurs in the data collection, analysis, and interpretation phases of the study. Integration takes place within data collection through the use of open-ended questions on a structured survey, within data analysis through the formation of qualitative themes generated through a survey, and through the transformation of qualitative data produced from open-ended questions on the survey into numerical scores. Quantitative and qualitative data are also examined for convergence of interpretive findings and they are merged into a single study rather than kept as two distinct studies complete in themselves.

By employing a mixed method the study aspires to portray a more holistic picture of the whole and have some generality to non-participants, while being grounded in the lives of the research participants (Tashakkori & Teddlie, 2003). In doing so, it resists the 'false dualism' of educational research by taking a pragmatic stance towards research design. It makes decisions on the basis of appropriateness to the research topic and existing knowledge in order to generate fuller and more insightful understandings of the 'reality' (Morse, 2003; Pring, 2003). One implication is that this study does not conflate positivist and constructivist paradigms, but employs a middle position, which has elements of both. It is grounded *epistemologically* in the relativist assumption that knowledge and meaning are social constructs. How we perceive and make sense of the world depends on the cultural lenses and symbols we have inherited and the interpretations the world we are born in. Cohen et al. (2000: 137-138) phrase it this way:

Humans actively construct their own meanings of situations; meaning arises out

of social situations; behaviour and data are socially situated, context-related, context-dependent and context rich; realities are multiple, constructed and holistic; inquiry is influenced by the choice of the substantive theory used to guide the collection and analysis of data and in the interpretation of findings; the attribution of meaning is continuous and evolving over time; social research examines situations through the eyes of the participants.

*Ontologically*, the study is grounded in the reality assumption that there are stable and enduring features of reality that allow different interpretations to flourish (Pring, 2003; Scott & Usher, 1999; Swan & Pratt, 1999).

## **Data Gathering**

Semi-structured thematic interviews, field notes, and surveys were used, along with primary and documentary analysis of official reports as supplementary data collection methods. Each is described in turn below.

### **Survey**

A survey using qualitative measures to gather data on the profile and domain of headship in the TRNC was carried out with 37 per cent of the head teachers in the primary and secondary education<sup>11</sup> system in the TRNC. By means of open-ended questions, head teachers were asked to give information on their professional background, their qualifications, their responsibilities and the main challenges they face. Some of the data collected – age, professional background and qualifications – were quantified and analysed using Excel, while data on head teachers' responsibilities and the challenges of the profession were kept qualitative. From this information it was possible to build a profile

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<sup>11</sup> See Appendices Da and Db for the survey.

of head teachers and refine the key themes for deeper investigation by qualitative strategies, in particular through the semi-structured thematic interviews.

The sample set was selected using the purposeful stratified sampling method. Schools were first divided into four homogenous subgroups of primary, junior secondary, senior secondary, and junior and senior secondary schools. Vocational schools and pre-primary educational institutions were excluded because the study focuses on primary and secondary schools only. Each stratum is mutually exclusive and they are collectively exhaustive. Every primary and secondary school was assigned to only one stratum and no primary or secondary school was excluded. Care was taken to fill sampling cells with one or two empirical cases that represented low-inference variables to exemplify the kinds and degree of variation essential for understanding the target phenomenon. These cases represented combinations of gender, school size, districts and deprivation of the area. It was advantageous to sample each stratum independently to reflect the diversity of the population of schools and to allow the differences among head teachers to emerge.

43 head teachers, equivalent to 37 per cent of heads in the TRNC, participated in the survey, of whom 56 per cent were male and 44 per cent female. Six of these heads were located in deprived neighbourhoods populated by the migrant population with their own subcultures, who have minimal contact with the majority of the TRNC community. These schools are predominantly populated by children of economic migrants from low socio-economic and educational backgrounds and have unstable patterns of mobility, further described in Chapter 4. They operate within a context with its own unique challenges that have serious implications for teaching, learning and management (Mertkan-Ozunlu & Thomson, 2006; Mertkan-Ozunlu & Thomson, 2009). It was thus critical to represent them in the sample. The size of the school and its location was also considered when filling the sampling cells, with particular attention given to include schools of various sizes and schools in rural and urban contexts.

A combination of methods was used to administer the survey. Participants were encouraged to choose the way in which they wished to carry out the survey (a self-administered questionnaire, an in-person researcher-administered questionnaire, or a researcher-administered questionnaire by telephone), to allow for a method of responding compatible with the schedules and preferred mode of data collection of the participants, in order to increase the response rate (Czaja & Blair, 2005). 53 per cent of the surveys were self-administered and 47 per cent were administered by the researcher. Of the latter, 45 per cent were administered in-person and 55 per cent by telephone. In-person questionnaires, and 87 per cent of self-administered questionnaires, were completed while I was in the TRNC in July 2006 and when schools were on the summer break. Because head teachers were in school only on Mondays for a short time during this time, the optimal solution was to contact them via their home or mobile numbers using the telephone directory provided by the Ministry of Education and Culture. To minimize travel time and costs, I conducted as many surveys as possible in each visit to a district and, where face-to-face meetings were not possible, I delivered as many questionnaires as possible to be self-administered later. The remaining 13 per cent of self-administered questionnaires were sent and returned electronically and researcher-administered telephone surveys were conducted from the UK, each telephone interview lasting from 30 to 45 minutes.

Each of these methods yielded a high response rate with only one respondent refusing to take part in the study because she did not want to reveal her identity by signing the informed consent form. To increase the response rate, factors reported as having a positive impact on the response rate were considered (Czaja & Blair, 2005). Repeated telephone call backs were used to reach the participants to convince them of the significance of the study and to schedule the questionnaire at a convenient time, venue, and mode before the questionnaire was administered. Two telephone calls were made to each respondent, the first one to obtain cooperation and the second to conduct the

survey. The questionnaire was accompanied by a research information sheet, which detailed the reasons and importance of the research project and the use and confidentiality of the research data. It also included an informed consent form to be signed by the research participants to achieve response rate advantage<sup>12</sup>. The research information sheet was read to participants taking part in the telephone survey. Copies of the research permission by the Ministry of Education and Culture were emailed upon request.

During face-to-face and telephone surveys, the design and layout of the questionnaire were more complex than in the self-administered mode. Multiple skip patterns were employed, and the order of the questions was controlled to allow responses to determine the flow of the survey; responses were also probed for clarification when and if necessary. This has led to richer data. Care was taken to probe self-administered responses by telephone when clarification was necessary.

### **Semi-structured Thematic Interviews**

Semi-structured interviews based on loosely-structured thematic interview protocols were carried out with thirteen head teachers, eight officials from the Ministry of Education and Culture, one teacher union leader, and six teachers from schools located in deprived neighbourhoods populated by economic migrants from Turkey. These interviews are divided into two groups. The first group was conducted before this study was refocused on building leadership capacity, and the second group was carried out once the study has been refocused on building leadership capacity. Each is explained in greater detail below.

The first set of interviews was carried out with five officials and focused on reform initiative and the challenges planners had faced. All informants were asked for their interpretations

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<sup>12</sup> See Appendices Ea, Eb and Ec for accompanying materials.



of the reasons for educational reform, the proposed model of education, the process and the challenges of change, and the material conditions that might enable or impede policy implementation. The purpose was not to conduct a rigorous 'policy trajectory' study, but to probe the cultural dimensions of change: namely, the stories, representations and categorisations of change used at the macro and micro levels of the education system. Further interviews were carried out with three head teachers and six teachers teaching in schools located in deprived communities serving the migrant population to further explore the dilemmas created by demographics on the island. Everyday conversations were also held with economists, politicians and researchers to investigate public policy dilemmas and gauge their views of the socio-political context in which reform strategies were initiated. Interviews and planned 'conversations' differed from everyday conversations in the degree of planning and structure imposed (Kvale, 1996; Radnor, 1994; Rubin & Rubin, 2005; Warren & Fassett, 2002). These conversations were recorded in field notes. These, together with interview transcripts, were coded to find recurring themes (Silverman, 1997; Strauss & Corbin, 1990).

The second set of interviews was conducted with three officials (one of whom had also participated in the first stage), a teacher union leader, and ten head teachers selected from the sample. These interviews concentrated on the domain of headship and professional development opportunities for head teachers within a broad policy context. All interviews, except the second set, were conducted face-to-face whilst the last set of interviews was conducted by telephone. All interviews were guided by three interrelated theoretical positions:

1. Interviewing is an interactive process during which representations of social world experiences are conditioned by the socio-political and socio-historical context of the interview process. No absolute truth claims can be held on these representations (Hammersley, 1992; Holliday, 2002; Miller & Glassner, 2004)

2. Interviewing is a medium influenced by identity work (Cassell, 2005; Seale, 1998). It is imperative to reflect on the interviewer's role in identity construction (Rapley, 2001)
3. The act of writing involves transformation of 'I-for-myself' to an image for the other in relation to the image of "the-other-for-me" in Bakhtinian terms (Morson & Emerson, 1990) and transformation of my crafted self to another through informed interpretations of different readers at different times in different places (Crotty, 2003; Straw, 1990). It is, thus, impossible to achieve fully transparent and truthful reflexive accounts.

Interviews were conducted in Turkish and transcribed verbatim. The conversation centred on pre-determined themes, but the interview questions were formulated following the dimensions introduced by participants during the interviews, after thematically and dynamically evaluating each response: thematically relating to its significance to pre-determined themes, and dynamically to the dynamic interaction between the researcher and the respondent (Kvale, 1996). This encouraged the construction of data that acknowledged the situated, experiential 'realities' of each respondent and allowed interview narratives of a world outside the interview context to emerge from contexts created for the interview purpose (Holstein & Gubrium, 1995; Miller & Glassner, 2004; Mishler, 1986). This approach required active, reflective listening on my part in order to be able to generate spontaneous questions relevant to the interview context and respondents' narratives (Hatch, 2002; Seidman, 1991). Each interview lasted from 60 to 90 minutes, producing between 8 and 18 pages of transcriptions. I have translated transcription extracts into English. Being privileged to carry out the study from a 'inside' position offered significant opportunities to produce translations that paid close attention to cross cultural meanings and interpretations (Temple & Young, 2004).

The design of the study concurs with earlier work that has underlined the importance of methodological and theoretical appropriateness for purpose and agreement between research techniques and research interests (Darlington & Scott, 2002; Hatch, 2002; Kvale, 1996; Patton, 2002; Pring, 2003; Seidman, 1991). Semi-structured thematic interviews were employed because I was interested in understanding and documenting others' 'realities' from their viewpoints. Elaborate insights into their views were thus imperative to my partial representation, the result of multiple representations from the moment I heard interviewees' subjective stories of their lived experiences in social worlds in which they operate. As Miller and Glassner (2004: 127) note, "knowledge of social world emerges from the achievement of intersubjective depth and mutual understanding". Access to research sites does not automatically grant access to narratives (Miller, 2004). Identities constructed in the field and beyond, and the social categories of which we are a member, influence interviewees' responses and thus the understanding achieved (Baker, 2004; Miller & Glassner, 2004; Riessman, 1993).

From the outset of the research process, I was aware that my ambiguous insider status would help to gain access to research sites and participants, but would not automatically grant access to interviewees' accounts situated in social worlds outside the interview context. For political reasons, gathering truthful accounts on some issues such as challenges rising from demographic dilemmas would be particularly difficult. Establishing rapport and building feelings of comfort and competence would be important. With these concerns in mind I employed every opportunity to convey a non-judgmental status and communicate my concern about the privacy of the interviewees and the confidentiality of the data both prior to and during the interviews.

Due to limited time and busy agendas of the interviewees, face-to-face and telephone interviews rarely started on time and some were postponed to a later date at the last minute. This meant many calls to the respondents, many visits to research sites and

extended waiting time. Though tiring, these were valuable opportunities to convey my enthusiasm and interest in the 'narratives' of the interviewees. Challenges around time management were not limited to the pre-interview stages. Face-to-face interviews, surveys and meetings were also often interrupted by phone calls and visitors. These made each interview last longer than planned or made it essential to continue later, also providing opportunities to express my concern about privacy and confidentiality. When interviewees received phone calls or visitors, I immediately stopped the interview temporarily and offered to go outside to provide more privacy. As the interview extract below illustrates, this helped to engender trust and comfort:

*You asked questions that helped me better organise my thoughts. I received lots of phone calls, but you did not get disappointed or angry when I answered. You stopped the tape recorder and I made the call. These are very important*  
(Keriman, policy maker)

Tight agendas are often presented as one of the main challenges policy researchers face. In my case, they presented themselves as opportunities to establish mutual trust and understanding rather than challenges to overcome. Likewise, challenges arising from resistance to disclose some information were accepted and exerting pressure was deliberately avoided. Exerting pressure on such issues would position me as a threat to privacy and would jeopardise my efforts to establish trust. I rephrased my questions in ways that would allow me to elicit the information I needed and that would allow the interviewees to avoid disclosing the information they did not feel comfortable with sharing. Narratives that emerged in interview contexts were not full and uncensored representations, but partial and censored representations of the private in public, influenced by the interview context. As Miller and Glassner (2004: 237) note, "a storyteller's narrative ... must be partial because it cannot be infinite in length, and all the more partial if it is not to be unbearably boring".

During face-to-face interviews and surveys I had access to numerous unrecorded accounts and opportunities to observe events at the time of happening. I trust this was the result of my efforts to establish rapport. When interviewees were called or visited in the middle of the interview, I was proactive in reacting to the situation and offered to go outside to provide more privacy to the interviewees. Most often, in policy contexts in particular, before I had time to offer to do so, interviewees introduced me to their visitors often asking for my views on the topic being discussed. These visits were sometimes by other interviewees to discuss some of the issues we were talking about during the interviews. Some other visits were by other people involved in the reform process, particularly teachers and committee members whom planners of education had worked with or by people from other units in the Ministry. I was privileged to have earned trust. I was also self-conscious of my responsibilities as a researcher to be worthy of it. During these informal conversations, interviewees' identities shifted from interviewees to colleagues, advisors, head teachers, committee leaders and back to interviewees soon after I pressed the record button on the tape-recorder. Different situations invoked different sets of membership categorisation devices (Baker, 2004). One of the main drawbacks of telephone interviews was the fact that by nature they provided very limited access to such opportunities.

## **Documents**

Three types of official documentary 'constructions' were explored to complement the survey and the interview data: (a) legislations and by-laws; (b) official documents on professional development opportunities; and (c) annual budgets of the Ministry of Education and Culture between 2001 and 2006. In total, 22 legislations, 27 by-laws, numerous files of official documents on professional development opportunities, and 6 budgets were explored to portray the current TRNC education system. In addition, numerous reports and legislations from the British Period dating from the early and mid 1900s were examined to explore the evolution of education on the island. These

documentary 'constructions' were regarded as data in their own rights rather than to cross-check data extracted from the surveys and interviews, or to provide a descriptive context (Atkinson & Coffey, 2004).

Exploring these documents was not a choice, but a given necessity. Firstly, literature examining education on the island during the colonial period is very limited even though the policies implemented at the time have had significant impact on the destiny of the educational systems and the socio-political issues in Cyprus. This means that anyone with a desire to understand the roots of the educational systems in the RoC and the TRNC unavoidably needs to work with primary documents. Secondly, being informed about the legal framework was an obligation raised in the field as the following fieldnote illustrates,

*It was not the first time an interviewee mentioned a by-law and commenting 'you should be familiar with this'. I was. However, even if I was not, I would not admit it. I am expected to be familiar with the legal framework. This is true especially for head teachers, whose everyday realities are shaped by this framework. Not being familiar with it would influence the conversation – my questions would be less informed and this would influence the way they see me, would affect my identity as a competent researcher. I either allow this to happen, or have a better understanding of the legal framework in which the narratives I am interested in are partially situated. (Journal entry)*

Issues emerging in survey administration and interviews were situated in a legal framework and references were often made to specific legislations and by-laws. Hence, it was essential to examine the legislations and by-laws themselves to form sharper questions and achieve more comprehensive responses. Third, exploring official documents on professional development opportunities was also mandatory. When I started to explore the current profile of head teachers, I was hopeful that I could infer the

professional development opportunities available to them by analysing the events they had attended. As the following field note demonstrates, I was wrong:

*It is frustrating. Less than a handful of head teachers remember the professional development opportunities they have attended. When asked why, almost all states "because we did not need to record them or remember them. We were given a piece of paper as a proof of attendance, which we have not yet used. So, we threw them away." I was naïve to expect them not to do so, knowing as I did from experience how little qualifications count in the public sector. (field note)*

This was a fascinating revelation, which emerged *despite* the structure I forced upon the participants. It came uninvited. Having not achieved my objective through this channel, I had to employ a different strategy. I decided to go through official means. I revisited the Ministry of Education to ask whether a database of professional development opportunities or events exists to which the answer was 'no'. In the absence of this database, I was given the official files to examine and a desk in the Ministry. Once more, I was fortunate to have established good rapport. No comprehensive information on the events was kept in the files. I had to examine the correspondence letters between different departments of the Ministry, which provided vital information such as the title of the event, when it was held and for whom it was organised. However, it was not rare to find references made to an event with no correspondence about it, in which case the event was not possible to track. My original aim was to quantify the data extracted from the files statistically, to portray the professional development opportunities that were available within the five years prior to this study. Nevertheless, because the data presented in the files was incomplete, doing so would result in misleading information. Hence, I have decided not to quantify the data collected.

## Data Analysis

Often a clear distinction is made between data collection and analysis in research texts, where data analysis is presented as a stage that starts only once data collection has been completed. During the course of this study, I struggled with this distinction, and concluded that it is more superficial than real in qualitative research, which by nature, is fluid and emergent (Gray, 2009; Miles & Huberman, 1994; Patton, 2002). Instead of waiting to finish fieldwork to start data analysis, I started to make sense of the data as they emerge in the field by recording what Patton (2002) calls 'in-the-field analytical insights' while avoiding formal coding to avoid focusing too much on analysis at an early stage. These insights were used to enrich data collection by adding new questions to test these early insights or selecting new participants on the basis of emerging concepts. For instance, following the concept of 'demographic challenges' emerging from the first set of interviews with policy officers early in fieldwork, new participants were selected from schools facing such challenges to deepen my understanding of these challenges.

When data collection formally ended, the interview transcripts, completed surveys, and field notes were first colour coded where each colour represents a pre-determined theme based on the research questions. In the case of the first set of transcripts produced from the initial interviews conducted on the reform initiative, the transcripts were colour coded using different colours for the themes 'reform initiation', 'challenges faced', and 'reform focus'. While analysing the second set of interviews, different colours were used for the themes 'responsibilities of head teacher', 'challenges faced', 'preparation and selection for headship', and 'professional development of head teachers'. Decisions about what data to colour code were driven by their relevance to the research focus. During this stage of data analysis, I began to identify a set of recurring patterns, such as the feelings of frustration in the absence of an annual budget, reports of the contribution made by school parents' associations, and reports of conflicts among key stakeholders.



The colour coded sections were then recoded to capture the essence of the statements. These codes became sub-themes and sub-sub-themes identified through an iterative process. This stage resulted in clusters of colour-coded data assigned to overarching themes containing sub-themes and sub-sub-themes. For instance, statements referring to challenges head teachers face (overarching theme) were colour coded brown. Sub-themes include 'financial challenges' (sub-theme), 'reasons for financial challenges' (sub-sub-theme), 'dealing with financial challenges' (sub-sub-theme). Some codes were assigned to more than one sub-theme or sub-sub-theme, as was the case with the code 'Ministry of Education' assigned to the sub-sub-themes of 'reasons for financial challenges' and 'reasons for bureaucratic challenges'. While arriving at the identified themes and sub-themes, factors underlined by Krueger et al. (2000) were also considered, with particular attention given to extensiveness and frequency.

## **Validity and Reliability**

Validity and reliability are two issues widely associated with the quantitative research paradigm. Despite the dominant paradigm for this study being qualitative, it is important to discuss them in order to present a credible study, which reflects as truthfully as possible the actual situation as it was at the time of the study. To achieve truthful and rigorous accounts, a number of strategies were employed to encourage participants to express their ideas freely and truthfully as well as to ensure a high degree of completeness.

To encourage truthful accounts, the study was conducted in Turkish, the mother tongue of the participants, to ensure that language was not a barrier. This was particularly important because most of the participants lacked the required fluency in English and lack of required language skills would inevitably influence their responses. This would potentially lead to data that are incomplete or incomprehensible resulting in findings that are not representative of the actual situation. Second, measures have been taken to minimise researcher bias on participants' stories by avoiding comments on what was being said or

by not interfering. This was deemed important in the context of this study particularly because some of the participants have constructed me as an 'expert' early during the fieldwork and it was felt that this construction would inevitably have an impact on participants' stories. In addition, as I have explained earlier, I have used every opportunity to build trust so that the participants would express their ideas freely and truthfully. For reasons already explained earlier, this was particularly important during interviews in challenging schools where demographic changes are an important issue.

One particular context-specific challenge that I faced was to do with politically-laden ideas. It was sometimes difficult to identify whether ideas mentioned represented the actual situation or whether their primary purpose was to blame the government in power simply because the participants did not share the same political views. This is common in TRNC where a blame culture resides due to different political views. I sometimes found myself listening to participants who claimed they faced a particular challenge and used it to harshly criticise the then government in power. A good example is the lack of a budget. In such instances, I had to ask further questions aimed at separating the challenges from political views and at further clarifying the comment made. In such instances, responses from different participants were also compared. Having insider knowledge of the culture and context specific commonalities made it possible for me to do so. Another advantage that my position as a Turkish Cypriot researcher provided was that participants provided more truthful accounts with the anticipation that I would not be deceived because I was familiar with how things actually are in the context of the study.

As the research unfolded, I listened to the data to ensure that there is congruence between the research questions and the data and by collecting and analysing data concurrently, I achieved an interactive interaction between data and analysis, which provided me the opportunity to constantly question what more needed to be known to achieve as complete a picture as possible. Active listening to the data was crucial as was

being open to be led by the data to ensure a high-degree of completeness, although always partial.

## **Conclusion**

This chapter explored how this research was carried out, why a particular research design was employed, and the impact of my identity on the research process, in particular in gaining access and data gathering. The next chapter presents the reform agenda in its socio-political context and outlines the main challenges and dilemmas faced by policy makers who want to make the reform vision a reality. The chapter is based on data generated from aforementioned documents, interviews with policy makers, head teachers and teachers from schools in socially disadvantaged schools, and in conversation with economists and politicians.

# **Chapter 5**

## **Professional Profiles, Roles, and Professional Development of Head Teachers**

### **Introduction**

I have argued in Chapter 2 that the domain of school leadership, in particular headship, has radically changed in many countries. Pressures demand school leaders focus on management strategies, evaluation systems and control mechanisms, at the expense of instructional leadership. There is also an increase in policy activity to improve the effectiveness of school leadership through preparation programmes and continuous professional development for school leaders. Locally this activity takes different forms, differs in intensity, emphasises different aspects of leadership and management, and results in different outcomes (Brundrett & Crawford, 2008). It is also still possible to find countries where there is lack of systematic leadership programmes and where the role of the head teacher is underdeveloped, which Greece is a good example (Gkolia & Brundrett, 2008) as is many countries in Africa (Bush & Oduro, 2006; Oduro & MacBeath, 2003).

In this chapter, I explore the domain of headship in TRNC, with particular emphasis on the professional profiles of head teachers, their roles, leadership preparation and development. This explanation will set the scene for the next chapter, where I critically combine the findings presented in this chapter with international literature to make suggestions as to how a 'glocalised' response to leadership development and improvement in TRNC can be crafted.

## Professional Profiles of Head Teachers

As argued in chapter 4, appointments, transfers, promotions and discipline of all managerial staff are controlled by the Public Services Commission consisting of five members appointed for six years by the President of the state. The appointment of head teachers is one of the core strategic functions the commission performs – once it gets it right, schools flourish, but if it gets it wrong they are destined for long-term stagnation that outlasts the appointed head teacher and affects his/her successor. The legal basis for headship appointments is set out in the Teachers Law, which clarifies that head teachers are appointed on the basis of their teaching experience rather than their leadership potential. Until recently, teaching experience of a minimum of seven years was the only prerequisite for leadership positions. Teachers who had been in the profession for over ten years could apply directly for headship while those with teaching experience of between seven and ten years needed to act as deputy head teachers or department head before applying for headship. The assumption was that teaching provides sufficient experience for leadership. Once they have met this criterion, they were interviewed by the Public Services Commission. Those who become successful in the interview were appointed to headship. There was a widespread concern among participants that this procedure was open to political abuse.

Until today those who have actively supported the political parties were appointed to headship. This is unjust, not objective. This is an illegal, anti democratic and dictatorial approach. Because of this procedure, the quality of those chosen to the position has long been questioned. Even those who were appointed because they were good were criticised as such that they were viewed to be selected to the position because of who they knew or because they support the political party in power ... It is important to improve this system. (Cemil, teacher union representative)

At the time of this study, a new law that was passed in 2005 to be enforced from February 2006 changed the selection criteria and selection processes for school managers requiring that they accumulate a minimum of 600 points from various sources to be eligible for application to managerial positions. These include a written examination of educational management, continuous professional development, employee reports, and seniority. As I explain in greater detail later in this chapter, specific leadership training or previous managerial experience is not compulsory prior to or upon appointment to headship.

Of the participating 43 head teachers, 18 held a managerial position before being appointed head teacher. Of these, 17 have acted as deputy head teachers while 1 has acted as a department head. The remaining 25 head teachers have moved from teaching to headship without previous managerial experience. When appointed for the first time, head teachers are appointed as candidate head teacher for a year. Their candidacy is reviewed after a year and they receive definitive appointment if found successful. No evidence has been found as to the criteria for the review of candidate head teachers apart from interview data, which disclosed attention only to managerial tasks. The criteria used seem to be sporadic and show variations as to who carries out the review and when. Esra, a secondary head teacher, underlines,

I was appointed to headship in [year]. They should have inspected me for a year. When I completed a year in the post I called the Ministry to say my definitive appointment should have been approved. They sent an inspector. He checked my files. I had filed documents relating to student absenteeism, income and expenses, things I have done over the year, documents sent from and to the Ministry. He also talked to the teachers, students and parents. He asked me about the social activities we had organised for students. We had organised a ball with the Student Council a day before the inspection and I told him that. He put

these in his report and my definitive appointment was approved a month later.

This arrangement does not match the requirements of the reform agenda and is inadequate for preparing the generation of head teachers the reform initiative needs to succeed.

Analysis of the data has shown that it is common practice for head teachers to change schools once they have received a definitive appointment; their decision depending primarily on the location of the school and its distance from where they live. Participating head teachers underline that the prime reason for relocating was to move closer to the district where they live. Standards of the schools were considered once they have moved to the district of their choice. Tokay, a primary school head teacher in Nicosia, demonstrates the case,

When I was appointed a head teacher to a school in [village A], I was married with two children. As we live in [city A], I tried to be appointed to a school in [city A]. But there was no vacancy in [city A] at the time, so I moved to a school in [village B], which was closer than [village A]. From there, I made a preference for [city A] and when there was an opening, I came here.

72 per cent of all participants have held previous headship positions before they moved to their current schools. 71 per cent of these have been relocated once, 19 per cent twice and 10 per cent three times. It is, thus, not unusual for some schools, particularly those in remote areas, to experience high turnover. Schools lucky enough to have a more desirable location experience prolonged leadership stability. Head teachers who make it to popular schools do not normally leave until they retire. There is no problem with this practice per se. However, in the absence of a rigorous evaluation and development culture, it has the potential to result in long-term stagnation particularly in cases where the

head teacher is not successful. Such cases are often not realised and not addressed, due to the lack of an evaluation culture. It is also common for head teachers to observe that it is not possible to dismiss anyone with definitive appointment, sometimes to the detriment of students. The following conversation with a primary school head teacher who has been in the same school for the last ten years illustrates,

**Ilhami:** Because I do not want to go to another village, I have not been in the transfer list for the last 8-10 years. But if I had wanted to move to another place, I would have moved there in time, but I did not. This village is my last stop. Head teachers and teachers can stay in a school as long as they want.

**Researcher:** So it depends on head teachers and teachers.

**Ilhami:** Of course. If a teacher does not want to move to another place, they do not. There are teachers from the village in my school, for example, they do not want to move to another place. They have been teaching here for the last 10-15 years. The ministry can not say 'that's long enough, you stayed here for 10-12 years, you need to move to another school. Teachers can stay as long as they want. In the past teachers used to stay 3-5 years. Now they stay as long as they want. They can stay until they retire if they want

**Researcher:** If a teacher is not successful in the school s/he chose?

**Ilhami:** No one can do anything unless there is an embarrassing crime, such as robbery, murder, rape. Unless there is such crime, it is impossible to move a teacher from one school to another. Success or failure? This is not important. Inspectors come and check but because they cannot fire anyone they cannot do anything. I don't know how good this is. I am leaving it to you to decide.

An important finding is that relocation depends entirely on head teacher will; decisions



solely serve personal aspirations of head teachers. Under the current Employee Transfer Order explained in Chapter 4, schools are in an inescapable position of living with unplanned succession. They are left to swim or sink depending on their location and how lucky they are to attract intrinsically motivated head teachers with energy to improve schools regardless of the lack of support to do so. No thought is given to the contextual realities and specific needs of schools or to sustained school improvement across multiple leaders. It has been found that unplanned succession is often the result of rotation policy used to identify effective head teachers and rotate them between schools to rescue schools facing crisis (Hargreaves & Fink, 2006; MacMillan, 2000). This is not the case in TRNC where governments have not shown any interest in evaluating school improvement and pedagogical development, let alone intervening in cases of failure.

If there is a complaint, about finance for example, the head teacher is inspected. So, inspection takes place when there is a problem. Except this, there are no mechanisms through which the performance of head teachers is assessed. No one knows what head teachers do in schools. Different stakeholders, from students to teachers, should be consulted when carrying out performance evaluation. These are yet to be done. We have recently started to even mention these things. We plan to do so over time. (Selim, senior policy officer)

Unplanned succession is not the result of the effort to rescue schools facing crisis, but of prioritising head teacher satisfaction over sustainable school improvement. It does not have the best interests of students in mind, neither does it give consideration to sustainable improvement, which is profoundly influenced by change in leadership. For the reform agenda to set in, leadership succession needs to be addressed. It is imperative to plan and manage leadership succession to give strong consideration to the needs of the school while also responding to the preferences of head teachers.

There is also a very large evaluation, and an interrelated incentive problem, buried in the reform strategy and more broadly in the TRNC education system. Participating head teachers have indicated that there are no mechanisms to evaluate performance and no structure harnessed to improvement. Analysis of the survey shows that 35 per cent of the survey participants believe lack of evaluation and an effective incentive structure is an important source of difficulties. According to the Teachers' Reward by-law, which sets out the conditions for teachers to be rewarded, there are three types of rewards: Tesekkur Belgesi, Takdir Belgesi and Financial Reward. Tesekkur Belgesi is given to those who demonstrate extraordinary performance in comparison to their colleagues, those who make translations or have educational publications recognised by the Ministry or related departments, or those who are rewarded a minimum of 90 points in annual reports. Takdir Belgesi is awarded to those who are rewarded Tesekkur Belgesi by the Ministry of Education and Culture for three consecutive years, those who publish, those who retire without disciplinary penalty on their records, or those who have scientific inventions. Financial Reward of up to three months salary is given to those who demonstrate extraordinary performance by preventing general damage, or achieving a general benefit, making an important contribution to the organisations they work for, or to the income of the public sector, or helping the public sector decrease its expenditure.

This incentive structure has three interrelated problems. First, the criteria are not improvement oriented. They focus on relatively irrelevant variables not directly related to the responsibilities of teachers. Secondly, it is designed entirely for teachers and does not embrace those in management positions. Thirdly, it assumes that there is a functioning inspection system in place. As was demonstrated earlier, the evidence suggests that this is far from the reality. Head teachers have also raised the issue that the incentive structure exists only on paper, not in practice.

[Reward and penalty] exists in legislations, but not in practice because many

teachers who deserve to be rewarded according to the teachers reward by-law were not rewarded. In addition, to be rewarded according to the by-law, you need to win a Nobel Prize. If you win a Nobel Prize, the Ministry rewards you. I mean you need to represent your country abroad, you need to achieve in order to be rewarded. There are also other rewards. For instance, those who do not have significant absenteeism might be rewarded as well. Such things have never been rewarded. (Ozgur, secondary school head teacher)

We do not have any reward and penalty mechanism. Those who are successful do not receive anything and no one does anything to those who are unsuccessful. There is no reward or penalty and no one distinguishes those who work hard and those who do not. It has been like this for years. (Aylin, primary school head teacher)

No one gives honorary rewards to head teachers for their success or no one says 'you neglect responsibilities and won't be able to carry them successfully so we are appointing someone else in your place'. We don't have such a system (Erol, primary school head teacher)

I do not know how long you have been living in England and how many years you have taught but you should know Cyprus. Teachers who work hard do not become head teachers or deputy head teachers. The number of those who do is very low. You know this as well as I do if you have lived in Cyprus ... I don't like this. It was like this in the past. We expected things to change but I am sorry that it is still the same. It makes me very sad to see that things are the same with the current government and people are promoted not because they are good but because they are close to the people in the government. Four out of five people are promoted like this and the other one probably works very hard for it (Salime,

primary school head teacher)

Of course, lack of performance assessment causes demotivation. Everyone thinks what they do is good but because there is no inspection, it is not possible to know how good it is according to specific standards or in comparison to general practice on the island. This causes problems (Selim, senior policy officer)

One way of interpreting this evidence is that the system relies entirely on the intrinsically motivated to invest significant amount of time and energy in improving their practice. The main problem in systems where there is a lack of evaluation culture and interrelated incentives problem is that intrinsically motivated individuals are typically too small in number to drive educational change and improvement (Elmore, 1996). Lack of appreciation of their efforts in fact acts as a demotivator and seems to influence the motivated head teachers negatively.

It definitely affects my performance negatively. We struggle without knowing what our objective is, what our standards are. Every head teacher thinks s/he is outstanding and his/her school does well. However, you need to have standards and schools need to improve themselves to achieve these standards. We don't know this. Everyone tries to fumble in the dark and thinks whatever they do is the best ... We constantly receive programs from the Ministry but no one cares about how much of these are done, how they are done. This is very wrong. (Ozgur)

Erol echoes Ozgur, "I think it makes education to deteriorate. It decreases motivation and makes the education system worse."

## **General Roles of Head Teachers**

The roles and responsibilities head teachers are expected to fulfil are articulated in Teachers Law. There is a significant degree of agreed clarity among the head teachers interviewed about the ways in which they conceptualise their responsibilities, which can be categorised into four main areas: fund-raising and fiscal management; dealing with bureaucracy; managing people and educational activities; and operations and improvement of school premises.

### **Fund-raising and fiscal management**

The main financial resources for schools are the Ministry of Education and Culture and subsidies made by Parents' Association and funds raised by the school. The biggest part of the operating budget of the school is the teachers' salaries, which is entirely met by the Ministry of Education and Culture; however, there is very little support from the Ministry for other expenditures. Fund-raising is one of the demands placed upon head teachers. Subsidies made by the school and the School Parents' Association are used for operations (day-to-day management) and improvement of school premises. There is a widespread consensus among the participating head teachers that the Ministry should provide schools an annual budget.

We do not receive any money from the Ministry. We have never had a budget allocated to us. We need to create our own financial resources. This is one of the most difficult aspects of headship. You need to do every thing you can to find money. (Alev, secondary school head teacher)

We do not receive financial support from the Ministry. They provide some stationary in the beginning of the academic year, but nothing else. We need to find sponsors and financial sources to improve premises. We are doing what the

Ministry ought to be doing but does not. This consumes most of the head teachers' time. (Serkan, primary school head teacher)

Head teachers make proposals to the Ministry of Education and Culture for contribution toward big-ticket investments. While a small number of head teachers acknowledge the discretionary funds of the Ministry are very limited and emphasise the contributions it has made towards the cost of big-item expenses, the majority complaints that these are rarely met, even in cases when the promise has been secured.

Before the launch of a project, we request some contribution from the Ministry. Explaining the problem, we ask what contribution they could make. They tell us to start and promise to make some contribution toward the total cost. We finish the project, but no contribution is made. I have such a project now. They promised to be responsible for the material cost and we would be responsible for the labour cost. We finished the project, paid also for the material cost, but they have not yet paid us back. Now we are in debt and are still waiting to receive the promised contribution from the Ministry. (Selda, primary school head teacher)

Schools do not have any budget allocated by the Ministry of Education and Culture. They survive on their own ... The contribution made by the Ministry is very low. I requested a computer the other day; we requested a printer; we also requested some stationery; but we have not yet received any response although days have passed. (Kaan, secondary school head teacher)

It is not clear how the Ministry chooses which projects to support and no document has been located as to what criteria is used when deciding which projects to contribute to and how much. That the funding decision process followed by the Ministry of Education and Culture lacks transparency makes participating head teachers question the fairness and

objectivity of this process. There is a clear sense amongst head teachers and policy officials that lack of a budget leads to significant difficulties and problems. 74 per cent of head teachers single out fund-raising as the most difficult part of their job.

It has a direct negative effect on us. You have to spend some of your time and energy on fund-raising. It puts a brake on you in a sense. You know our main responsibility is with teachers, students and the staff. What do we do? We plan, direct, assess, report, and try to solve the problems about teaching and learning. This is our main mission. But unfortunately ... I do not have a budget. I have to deal with this as well because it directly affects you ... I have to pay for cleaning agents, fix the doors when they are broken for example. No one does these for you free of charge. I have to do these. (Erol, primary school head teacher)

Evidence from surveys and the interviews gives a flavour of the different challenges head teachers are facing. Heads spend a significant amount of time dealing with issues ranging from byzantine bureaucracy to financing school infrastructure. This school-context work is carried out at the expense of teaching and learning. Selim underlines,

Not having a budget of their own makes things cumbersome. For instance, if the school runs out of chalk, the head teacher needs to request it from the Ministry in writing. This takes about a week. Similarly, if they need a ball, the Ministry needs to buy it and send it to the school ... So, lack of a budget brings about important bureaucratic barriers when it comes to obtaining such small items; it leads to waste of time. The students cannot receive them in time. This is one side of the problem. Second, not having a budget of our own delays infrastructural improvement. The state allocates some money to infrastructural improvement and spends this for the schools it gives priority. However, if every school is allocated a budget, the schools can solve its infrastructural problems with the Parents'

Association. This, of course, is important.

In order to address the economic problem, schools raise their own funds. Common strategies they include are running the school cafeteria or leasing the cafeteria, and selling school uniforms and school magazines. It is also common to solicit and receive help in the form of free labour or donations. Organising supplementary lessons in smaller classes at a nominal fee is another strategy used by secondary schools. As Suleyman states these classes are demand-led and contribute to the school budget,

These classes are not compulsory ... They are voluntary. We send letters to the parents, those students who want to attend these classes fill the form, parents sign it and send back to us. They are at a nominal fee and are organised in many schools. They are under the control of the Ministry and are subject to the permission of the Ministry. They are demand-led. They are not in demand in vocational colleges because these schools prepare students for a job; but colleges, and comprehensive secondary schools prepare students for the university. Two years ago we started to prepare students also for GCEs to prepare them for universities abroad and so some parents want these classes ... There are private lessons outside schools as well. The ones we offer are at the one fourth of the price. We pay the teachers for overtime and buy stationary for the school.

This is a practice of mutual benefit. Analysis of the data suggests that this is a common practice in secondary schools, but the exception in primaries although a very small proportion of them report organising supplementary IT and music classes at a minimal fee. Since preparation for state colleges is very important in TRNC and it is very common for students to have private tuition, it is not clear why primary schools do not offer supplementary classes for students who want to prepare for state colleges. Head teachers



report that the school budget is too small to meet the day-to-day operational needs let alone the improvement needs of the premises without significant contributions from the School Parents' Associations. The legal basis for the roles and responsibilities of School Parents' Associations is set out in School Parents' Associations and Federations by-law, which clarifies that School Parents' Associations responsibilities include:

- informing parents about the educational goals and principles of the school including organising "Educational Days" (with the permission of the head teacher) to allow parents observe classes, and informing parents about the challenges schools are facing to achieve their aims and bringing parents together to discuss how challenges can be addressed;
- working together with schools to educate children and young people about health and hygiene, including organising conferences about the development and education of children, working to build students' understanding of First Aid, building and maintaining consensus about recognition and treatment of contagious health problems;
- working together with the school leadership team to enhance student performance; this includes explaining students the negative impacts of absenteeism, and exploring the reasons of student absenteeism;
- providing social benefits, including supporting schools financially when and if necessary, contributing towards social and cultural events, and financially supporting pupils from socio-economically challenged conditions.

Though some head teachers mention that School Parents' Associations organise conferences and seminars on topics such as health and hygiene, the majority of head teachers stress that the main function of School Parents' Association is to raise funds to support schools. Organising fund-raising events is a common strategy. Evidence suggests that School Parents' Associations have largely been confined to fundraising rather than

having any meaningful democratic role. There is enough evidence to suggest that socio-economic conditions of the area in which schools are located impact the fund-raising capacity of the school and School Parents Association. The biggest challenge is observed by head teachers managing the schools predominantly populated by children of economic migrants of low socio-economic backgrounds. This reflects dramatically changing demographic patterns in the last decade (Hatay, 2005; Durber, 2004). It has been often underlined that the low socio-economic conditions of migrant parents have drastic effect on the fund-raising capacity of schools and can act as a demotivator.

I have bigger projects, but we do not have a sufficient budget to pay for them. Half of our students are migrants from Turkey and they come from low socio-economic backgrounds. Their parents are economic migrants who come here to work. When you force the parents, they pay for the registration, but do not pay for anything later, do not contribute to fund-raising activities. So I do not have ambitious projects and objectives. (Esra, secondary school head teacher)

Last year, for example, we launched a campaign to raise money for air conditioning; all of the Turkish Cypriot parents contributed, we collected money from businesses, and we managed to get it done; but none of our Turkish parents contributed towards the project. Of course, their children also use this with the others, but we go through the difficulties. (Selda, primary school head teacher)

Analysis of the data shows that some head teachers challenged by socio-economic conditions solicit and receive free labour from parents who cannot otherwise make contributions to the school budget. Kaan notes,

We try to meet most of our needs ourselves. If the parents are sensitive to education and their economic conditions are good, or if they have a big social

network, it is easier for you to do so. However, in schools such as ours this is very difficult. Even to fix a broken door or window is a problem for us. Sometimes there are craftsmen among the parents; they do these. It is sad to say so but we sometimes have to receive free labour from the military personnel, when we paint the school for example.

Head teachers are diligent and meticulous about their schools' financial affairs. The main reasons for this are: (a) head teachers are obliged to report every fiscal act to the Ministry of Education and Culture; and (b) head teachers believe if they do not raise funds for operations (day-to-day management of the school) and improvement of premises, no one else will. Feelings of isolation are not uncommon among head teachers, and there is strong evidence to suggest that head teachers believe fund-raising takes most of their time, sometimes at the expense of focusing on tasks they perceive as more appropriate. Evidence shows that head teachers are torn between the need for fund-raising and fiscal management and the desire to improve teaching and learning and are frustrated by the perceived lack of systematic support to do so.

## **Dealing with Bureaucracy**

Chapter 4 has shown that the TRNC educational system is highly centralised with an entrenched bureaucracy. The Ministry of Education and Culture is the policy-making and administrative organisation of the government for education. It develops, designs and executes policies for syllabi, curricula, textbooks, and regulates all educational organisations under its jurisdiction. Head teachers are accountable to the Director of Primary and Secondary Education within the Ministry, and they are obliged to report in writing everything happening in schools to the Primary and Secondary Education Directors and seek written authorisation for everything. Paperwork includes four monthly reports on the activities and improvements made to premises, absenteeism of teaching

and non-teaching staff, the staff eligible for overpayment, annual teacher inspection reports, timetables for each semester, and daily communication with respective branches of the government. Communication with external organisations including respective branches of the government has to be channelled through the Ministry of Education and Culture. In addition, head teachers also need to act as a communication channel between the Ministry and the teaching and non-teaching staff.

All of our correspondence with other organisations takes place through our Ministry. If a branch of the government, other than the Ministry of Education and Culture, they need to write to the Ministry of Education and Culture who then lets us know about the issue. If we are to write to any other branch of the government, we need to approach them through the Ministry of Education and Culture. But in some situations we can contact them directly and then inform our Ministry. So, our communication with any branches of the government takes place through the Ministry of Education and Culture. (Kaan, secondary school head teacher)

Of course, we receive a lot of letters from different branches of the government. You read these and file them to be able to find the relevant one when asked for. In addition, there are some letters concerning the teachers. We might receive an announcement about English language teaching, for example. You need to announce this to relevant teachers, take photocopies and get their signatures if necessary. We also receive letters asking us to choose some teachers and inform the Ministry accordingly. We also receive letters asking us to identify the teachers who will attend a course or who are interested in taking responsibilities on a specific task. (Tarkan, primary school head teacher)

It is common for participating head teachers to emphasise and complain about the amount of correspondence with the Ministry. One of the tasks head teachers find time consuming

at best is bureaucratic red tape, in particular, correspondence with the Ministry of Education and Culture. It is common for them to report spending one to two hours a day on paperwork, which they describe as daunting.

Every single day we receive a couple of letters from the Department of Elementary Education, Ministry of Education and Culture or other branches of the government. We read these, plan when to deal with each and try to reply before the deadline. We completed the first semester and these letters made one and a half files. We wrote 120 letters, the ones we received are much more. (Erdogan, primary school head teacher)

What is most striking is the lack of assessment data on the quality of education in a system that seems to be obsessed with bureaucracy. No evidence was gathered to suggest that paperwork includes data on the extent of learning in schools, a finding also previously reported by World Bank (2006b: 85),

There are no objectives and comparable data on the quality of education, especially on the extent of learning that takes place among students in the schools in the northern part of Cyprus. The quality of an education system is sometimes thought to be determined by the students' success in selective elite schools, such as some private schools or the publicly-run Maarif Colleges. Moreover, quality is often confused with high participation rates, especially those studying in higher education institutions. Therefore there is only anecdotal evidence of the quality of education in general.

The written communication is conducted using pen and paper and regular mail instead of electronic communication; head teachers, in particular the ones not in the capital, argue that they sometimes do not receive the documents in time or that the documents are lost

in the post. Centralisation and the means through which communication is maintained between the Ministry of Education and Culture and schools is one of the most problematic features of the TRNC education system.

## **Management of Teaching**

One of the key responsibilities of head teachers by law is to manage teaching and learning, including timetabling, delegating duties and ensuring they are carried out, organising educational and other activities in schools, making sure the educational programmes decided by the Ministry are followed, and preparing annual employee reports for teaching and non-teaching staff ("Ogretmenler Yasasi", 1985). Nevertheless, evidence suggests that there are chronic deficiencies in the system that make it almost impossible for head teachers to maintain good teaching standards in schools. Two crucial problems identified are the lack of a strong infrastructure of pressure and support, and the opaque promotion policy of the Government. Analysis of the data reveals head teacher belief that among the challenges directly influencing the standards of teaching and learning are teacher incompetence and absenteeism. It has been observed that 33 per cent of participating head teachers believe that the majority of teachers are not equipped with adequate pedagogical knowledge and skills; similarly 33 per cent of head teachers argue teacher absenteeism and shirking of responsibilities are common practice among teachers. Cenk, a policy officer, underlines that when a teacher wants to get sick days and brings a doctor's note, head teachers have to accept it.

**Cenk:** The head teacher is responsible for approving absences due to sickness or personal reasons. If teachers want to go somewhere, they need to get permission from head teachers. If they want to go abroad, they need to get permission from head teachers. If head teachers do not approve it, teachers cannot go anywhere.

**Researcher:** If the head teacher decides it is not appropriate for the teacher to take a day off and the teacher wants to take a sick day, the head teacher (interrupted)

**Cenk:** Cannot do anything ... When you receive doctor's reports, you see that the doctor has given three reports in a month – in the beginning of the month, in the middle and in the end – but when you look at the serial numbers, you see that they were all written the same day. We had such problems as well. Of course we complained about this. Someone else gave reports for four days in the beginning of the month, four in the middle, and four at the end ... Has this doctor not written another report for anyone else? When you check the serial numbers, they all follow each other.

Among the difficulties head teachers seem to frequently face are getting teachers to supply teach, to serve outside their teaching hours, to work in the afternoon, and to impede teachers from frequently taking leave of absence. They have stressed that they are deprived of any power to enforce disciplinary action in case of a problem. This seems to be the belief also shared by one of the leading teaching unions in the country.

I read the law three or four times. There is only one thing I can do, to report to the Ministry. I can report when teachers refuse to carry out their responsibilities, when the other comes late, and the other is unable to teach well. I cannot do anything else. (Erol, primary school head teacher)

Head teachers do not have any authority to get things done. When a task is not done, head teachers cannot get people to do it; they don't have any legal power. They need to share such problems with the Ministry of Education and Culture. In North Cyprus, we don't have strong legislation to inspect those who do not work properly. When you don't solve problems immediately, they grow. This is an

important problem because head teachers do not have a school budget to get things done, they also don't have any authority but they are responsible for everything that takes place in schools and also for all the problems that might arise. (Tarkan, teacher union representative)

Head teachers often observe that the Ministry is also not effective in dealing with disciplinary cases reported to them. It is a widespread observation among participating head teachers that in such circumstances, teacher demotivation is acute, for which students pay the biggest cost.

When you report a teacher who does not come to work properly, pay-roll deductions do not apply. There isn't a proper reward and punishment system. I am very sorry to say this, but schools are not regulated and how well a teacher or administrator performs is left to their conscience. Good teachers and good administrators perform well, but bad ones also survive in the system. There is no one to stop this. (Erdogan, primary school head teacher)

I had such an event in the past. Of course, it has a major effect. First, that person becomes a bad experience for his/her colleagues. If someone who deserves disciplinary action does not receive one and continues to be paid, others start questioning why they should work. Second, it holds you back. The students are not educated properly. They are the ones who pay the biggest cost. The parents become troubled and this affects you negatively. If we had had power to enforce disciplinary action, we could do so. Other teachers would then say "s/he did not do his/her job properly and was punished, I have to do mine properly". (Aylin, primary school head teacher)

There is significant consensus among participating head teachers that if one of the main



reasons for this apparent lack of disciplinary action is the politicised nature of the Ministry, in particular fear of loss of votes, the other is teacher unions' misuse of their power.

In recent years, teacher unions, and I say this as a teacher who had an active role in the management of [Teacher Union A] for many years, [Teacher Union A] has acted in opposition to the Ministry in order to protect its members unconditionally, without even questioning the event, even when they secretly think that a teacher needs to be warned because of his/her educational defects. They act as if their sole responsibility is to protect teachers. This influences education negatively. Continuously, but of course criteria is very important here, when policy officials are to identify any criteria regarding reward and warning, unions also demonstrate strong opposition. They argue that employing a reward and warning mechanism would cause discrepancy among head teachers. They say they all graduated from the [Ataturk Teachers]<sup>13</sup> Academy, they all are teachers and they all do this job. This does not work like this, even with two machines of the same model produced by the same factory. Let's call them cars: one of them makes 190 km while the other has problems at 185 km. This also applies to teachers. (Tarkan, primary school head teacher)

If you warn a teacher saying, 'you are wrong here. I will not pay you until you change your behaviour', the union immediately comes against you. They argue that you were not being fair to its member. They might be right or wrong but they have to defend their members because they are their members' lawyers. On the other hand, it is also political. Often votes stand out. They think 'there will be another election after about 3-4 years and I will ask for this person's vote. I need to look good to protect these votes.' Some things continue like this. It was like this at least until today. (Aylin, primary school head teacher)

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<sup>13</sup> All primary school teachers are trained in one institution only.

The union stands in the forefront and they always intervene. The Ministry is also not effective when it comes to this ... Teachers have not received any disciplinary action about this. Neither the Ministry nor the head teachers have much power to punish bad practice because of the unions. The union exists to protect teachers' rights but I think they have gone too far. Instead of protecting teachers' rights, they try to reduce the teaching hours while increase the salaries. The less hours teachers teach, the better. Teachers want to teach less and earn more and because they know the union thinks the same, they turn to the union when they are in trouble. (Esra, secondary school head teacher)

In a system where it is head teachers' responsibility to maintain good teaching standards, but are deprived of any power to enforce disciplinary action, these deficiencies can prove paralysing. Nevertheless, the legal framework allows them to reward good practice. Even though this is the case, none but one of the head teachers has stated that she does so. She stresses,

Rewarding good practice can happen: I can organise a small award ceremony and give a plaque or I can give plaques to teachers in the graduation ceremony. For example, I have a deputy teacher who will retire because s/he will soon reach the age limit. S/he will become 60 in March and will not be able to attend the 2006-2007 graduation ceremony. We gave him/her a plaque to thank for his/her service. I can give such plaques. Or there was a teacher who worked here for 4 years, having been appointed from Turkey. I also gave him/her a plaque. When it comes to students, I gave those who became first, second and third in the school. These are the rewards I can give. (Esra)

As the above quotation demonstrates, what is rewarded is not necessarily good practice but rather teacher loyalty. This leads to the findings that head teachers do not utilise the

power they have to encourage instructional improvement by rewarding exemplary practice. Apart from the findings demonstrating that the Ministry fails to reward good practice and to take appropriate action when there is a problem, it has also been observed that head teachers are not well-prepared to effectively complete the employee reports. Some even question how well head teachers are aware of instructional problems and report that they very rarely, if at all, observe classes and judge teachers based on observations outside the classroom. Ozgur, a secondary school head teacher underlines that this distance limits his awareness of the pedagogical problems teachers are having as well as the improvement they are making,

The head teacher completes the employee reports ... To be frank, we don't complete our section scientifically either because I usually observe teachers outside the classroom. I can assess their motivation, but no one knows what they teach in class, how well they teach, whether they use effective pedagogical strategies. No one knows.

Among the common strategies head teachers use to inspect the quality of education are observation outside the classroom, considering the reactions of the pupils and the parents, and looking at the level of the students when supply teaching. Tokay notes,

There might be teachers who do not come to school. We have a protocol: deputy head teachers teach the classes when teachers do not come. When the number of absent teachers is high I also teach classes even though I am not obliged by the law to do so. I do so to see what subjects students are doing, to check their level, to see if they are happy with the education they receive by asking them questions or by discussing a topic with them. More than inspecting teachers, student satisfaction is very important for me because I want them to come to school with will. I want them to be happy in this school. Concerned with creating

such an environment I try to see how well we are doing regarding student satisfaction, what are the challenges we need to overcome, what else we need to do, and whether the education they receive is sufficient by talking to students. Sometimes parents complain as well. They complain about the teachers. When we try to tell them about the reasons, we also try to solve the problem.

Aylin also states,

Of course the most important way of assessing teachers is observation. Most of the time we are with the teachers and we see how a teacher behaves towards students, parents, and their colleagues. When you talk about classes, to tell the truth, I have not yet observed a class. I have not observed any classes, but you know that news about problems travel. When you are outside your office you can understand how someone teaches. Second, I always say students and parents are the biggest inspectors. By looking at the reactions of students and parents you can understand what kind of a teacher someone is, but I have not done any classroom observations before. I believe this can make them uncomfortable.

Only two head teachers mentioned doing regular observations, once a month or once in twenty days, to assess teaching and learning and use the information gathered to help teachers improve instruction. No other means of supporting pedagogical improvement was mentioned. Evidence suggests that assessment is not a priority for head teachers and takes relatively less time in comparison to fund-raising and operations. It is clear that head teachers associate school improvement mainly with the improvement of the premises and equipment. It is common for the majority of the head teachers to list the changes they have made to the premises and the equipment they have bought when talking about the things they have done to improve their schools. Lack of reference to supporting pedagogical improvement suggests that this is not a common practice among

head teachers, while the absence of systematic assessment of teaching and learning suggests that pedagogical problems and the extent learning takes place might be off head teachers' radar. Only one head teacher has stated that in addition to the regular classroom observations she does, she asks teachers to test students regularly and uses this information to judge standards in the school and to support teachers to improve instructions. Evidence suggests that this is a rarity, and it is not common for head teachers to lead pedagogical development, although they acknowledge that professional development opportunities offered by the Ministry of Education and Culture are, more often than not, ineffective.

Evidence also indicates that the majority of the participating head teachers are not improvement oriented. Instead, they see teacher 'incompetence' as something to be punished, normally by the Ministry of Education and Culture. Lack of effective professional development opportunities for teachers makes instructional leadership of head teachers more important in TRNC than it is in contexts where there is wealth of effective opportunities assisting teachers to improve their practice. To fulfil their role as instructional leaders, head teachers need to address all of these three domains by assisting teachers to deconstruct and reconstruct their professional knowledge and values, creating opportunities for collective inquiry into practice, and building a supporting structure to encourage connections among various teams and organisational members. Research evidence leaves no doubt that this is far from the role head teachers have so far held and their current capacity to fulfil the role of instructional leaders is highly limited and needs to be improved.

## **Planning and Management of Extracurricular Activities**

Extracurricular activities show wide range of variation depending on the context of the school, which suggests that these activities also address and aim to redress contextual

difficulties schools face. Schools accommodating children of migrants from Turkey, for instance, often organise events to educate parents as well as students. It was common for participating head teachers and teachers to complain about the attitudes of migrant parents and about education deprivation in the area they serve. Extending extracurricular activities to parents is expected to help this situation to improve and in some cases, to help these parents to participate more in the education of their children. The experiences of Alev and those of Kaan are, thus different. Both manage secondary schools; however, while the former serves an affluent area, the latter serves a disadvantaged community of migrants from Turkey.

Cultural activities, sports activities, these are what we can do independently. They depend on the head teacher's energy and ability to take initiative. For instance, there are some cultural activities I organise every year. Of course, I organise these to improve my students' education. Things like introducing national authors, poem days, inviting visitors from outside the school to talk with the students. On Monday, students sell the cakes they bring from home and donate the profit to the society for the prevention of cruelty to animals. Through these activities, we are trying to get the students to socialise and to teach them solidarity. We also organise dinner parties and events for teachers to get together. Graduation is also something we decide entirely on our own. You can have a big ceremony or you might have a very simple ceremony. You might have a prom or you might not. We organise the social activities such as these. (Alev)

Through consultations with the Ministry of Health we organised events on personal hygiene, environment, nutrition, personal contact. These subjects are held by experts. With respect to their nutrition, as I said, these are all children of blue-collar workers. Experts from the Ministry of Health give talks on how their nutrition should be. We did not stop here. We organised seminars also for the

parents. These focused on how their relationship should be with their children, how they should behave towards their children, how they should address their children, how they should help their children. (Kaan)

Planning, initiation and management of extracurricular activities are among the responsibilities of head teachers, even though such activities are still subject to the final approval of the Ministry of Education and Culture. Analysis of the data suggests that head teachers do not experience any problems with obtaining permission for these extracurricular activities.

There are things we can make decisions on. For instance, when we organise a trip, we need the permission of the Ministry. We write them a letter describing the nature of the trip and ask for a written permission. We call it permission in theory, but it is more like informing in practice. On one hand, you are bound to take permission and are not able to make decisions fully independently, but we have not heard a single case where permission was not granted. It is more like making decisions in consultation with the Ministry. (Tarkan, primary school head teacher)

It seems evident that head teachers frequently need to consult and work with external organisations, such as different governmental offices and universities to organise activities. Evidence suggests that head teacher respondents to the survey and interviews had responsibilities involving external collaboration, mostly with governmental offices and universities. Most observed this beneficial to their school.

## **Management and Improvement of School Premises**

Participating head teachers have stressed both in the survey and in the interviews that management and improvement of buildings and premises take a significant proportion of

their time. Areas where head teachers spend significant amounts of time include health and safety, hygiene, and routine maintenance. Soley, a primary school head teacher reports,

Apart from our legal responsibilities, we do everything from getting the building painted to fixing broken things. We are trying to have a car park built to improve student safety. There was an available space at the rear of the school. We are getting it cleaned to turn it into a car park. Once it has been done we will not give access to the school. I was there checking things when you called the other day.

Evidence suggests that head teachers associate school improvement in most cases entirely with the improvement of premises. This seems to stem from the perceived lack of authority to make more significant changes, which they report to be a task the Ministry of Education and Culture needs to fulfil in consultation with the relevant teacher unions. When asked what he had done in recent years to improve standards in his school, Erdogan, a primary school head teacher notes,

We do not have the authority to change education. If we are to make changes in the educational system, the Ministry of Education and Culture builds a strategy in consultation with teacher unions and we implement this. I mean we cannot make significant changes in the school. What we can do that does not go against the Ministry, our by-laws, our citizens are to do with creating a nice educational environment and nice classrooms. For example, in my school, every classroom has curtains, wooden chairs have cushions, desks that teachers use have covers because teachers like to have covers. We achieve these with the help of teachers, students and school management. We have heaters and we are having air conditioners fixed. I think having warm classes helps to improve educational standards. And by having clean premises, we also improve student motivation.



Nevertheless, there is widespread consensus among the participating head teachers that the management of building and premises should not take so much time.

## **Management of Student Transport**

89 per cent of secondary schools and 57 per cent of primary schools identified by the Ministry of Education and Culture take in students from surrounding small towns and villages. Transport of these students is arranged and paid by the Ministry of Education and Culture ("Zorunlu Tasimacilik Tuzugu", 1986). To be eligible for free transport, students need to register to the school closest to their home towns. Management of student transport is among the duties head teachers running these schools undertake on a day-to-day basis. Guzin, a primary school head teacher states,

Drivers now have companions. It is a great initiative that started last year. I deal with any problems with the companion, if any. They need to sign for arrivals and departures. I deal with these. I talk to them about student behaviour on the bus.

It was observed that none of the head teachers found it daunting to manage student transport, which was perceived to be a relatively easy task.

## **Preparation and Professional Development of Head Teachers**

In TRNC there is no formal requirement for head teachers to be trained leaders. As I have demonstrated in the previous section, it is typical for head teachers with no management qualification and experience to be appointed to headship on the merits of their teaching experience only. There are no formal programmes for prospective head teachers, but there are a number of masters level courses in educational management available from universities. These courses are not compulsory for head teachers taking up their first

headship appointment and those who take them do so purely for personal reasons. Deniz, a primary head teacher underlines,

**Researcher:** Did you receive any leadership training before you were appointed a head teacher?

**Deniz:** No we didn't. We took an exam. We got prepared by studying our legislations and daily events. No leadership training was given.

**Researcher:** Did you receive any leadership training after you were appointed but before you started acting as a head teacher?

**Deniz:** No, no and this is an important shortfall.

Adnan, another primary school head teacher echoes Deniz,

Public Services Commission or the Ministry of Education and Culture announces the number of vacancies. There are conditions. A teacher with seven years of teaching experience can apply for deputy headship; a teacher with at least ten years of teaching experience can apply directly to headship. Because I had sixteen years of teaching experience at the time I applied, I applied for headship. Then you sit for an exam, which tests your knowledge about legislations, by-laws and your technical knowledge. After the examination, you are invited for an interview.

Of the head teachers who participated in this study 71 per cent have only one qualification. In case of primary school head teachers, this is a teaching diploma awarded by the main Teacher Training College in the north of the island – Ataturk Teacher Training Academy, which is compulsory for primary school teachers; in the case of secondary school teachers, it is an undergraduate degree mainly on a subject of their choice. A teaching diploma is not compulsory for secondary school teachers and an undergraduate

degree on a subject of your choice is sufficient for being appointed as a teacher in secondary schools. While the remaining 29 per cent of head teachers have more than one qualification, it was observed that it is an exception for these to be in educational management with only 3 per cent of head teachers having a relevant qualification in educational management. The TRNC education system seems to be working on the assumption that good teachers make good leaders with no preparation for leadership and many of the serving head teachers seem to lack basic leadership and management training. Through recent legal changes, the new government has tried to address this problem. Today having a qualification in educational management, attending in-service professional development courses, and years of teaching experience are all taken into consideration in appointments. It is not yet mandatory to be educated in educational management, but now it is to the advantage of the applicant.

Another critical weakness that became apparent during the study was the lack of support mechanisms to be obtained by new head teachers during their transition from teaching to headship. Once head teachers are appointed, they receive very little interest and need to survive with very little feedback, guidance and direction. The adoption of the pragmatic approach and relying on experiential learning while in the post and "learning how to lead through trial and error" is very common among new head teachers. Evident lack of attention to the preparation and induction of head teachers in TRNC implies a need for a more sophisticated approach to recruitment, preparation and induction.

Analysis of the data from the survey and interviews suggests that professional development of experienced head teachers is another pressing area that needs attention. In TRNC professional development of teachers and administrators does not seem to be among the policy priorities, and professional development seems to take place in a sporadic fashion rather than as a well-articulated mechanism for building capacity for school improvement or for implementing reform. Evidence suggests that the available

professional development opportunities are not well-suited to enhance the effectiveness of head teachers. They are confined to short seminars and conferences of mainly a couple of hours with no translation phase to support the transfer of new knowledge and skills into the workplace. It is common for head teachers to stress that these courses do not enhance their capacity to lead. Head teachers note,

The Ministry calls it in-service education. A number of people come from Turkey normally for holiday and they organise a seminar for them to deliver while they are here. It is not possible to say these courses are productive. Aren't there any productive ones? Of course, there are. If you take about 10 courses, one or two of them are productive. The remaining seven or eight give us the opportunity to see the friends we had not seen for a long time (Tokay, primary school head teacher)

A range of courses were organised for head teachers such as the ones on filing the documents, official correspondence but we were already aware of these. We saw how things were done also when we were teachers. I cannot say these in-service courses gave us anything. It might remind us some things, we might learn a few things, but not much (Erol, primary school head teacher)

Leadership education is given in in-service training courses. The ones organised in North Cyprus today are very short. If you mean short courses of a couple of days by professional development, it is questionable how well leadership education can be given in such short courses. (Tarkan, primary school head teacher)

The weaknesses commonly observed by the head teachers relate to the content of the courses, the delivery models, and the competence of the presenters. Examination of the in-service courses organised from 2000 to 2006 reveals that a significant proportion of

courses was organised for school administrators. These include at least 38 courses in different topics including topics that have little significance to educational leadership and management, such as the rules of official correspondence and national values for school administrators. It is common for head teachers to underline that the professional development activities focus on issues of little significance and do not add much to their existing knowledge and skills. Salime, a primary school head teacher, underlines,

Every year they organise one-day long courses on topics they are interested in. I cannot call these education; these are what they want, in-service training course on the topics they think are important. For example, if something is changed in the system, if there are things we need to pass to the teachers about these changes, they inform us about these. We then explain these to teachers.

She concludes, "The courses do not really aim at enhancing our capacity to lead. They are not courses that would influence how I manage." When asked on which topics professional development opportunities should focus, head teachers tend to emphasise that learning about things implemented in other educational systems would be very useful in helping them enhance their effectiveness.

Things that we do not already know. Things that we can do. Things that are done in other countries, but not in our country. (Soley, primary school head teacher)

What used to think what was taught in the past was good at the time. I mean in our time, in 1994. Today it is 2007 we have come a long way ... If we consider our era today, it is not sufficient. Today, courses focusing on how to keep a good record of things, behaviours, are very simple. They were ok for the time being. Today, a lot more should be expected from a head teacher. Today, it could focus on topics such as what a head teacher does in England, for example, or what the

education system is like or what makes a head teacher a good manager. It should be more in depth. For example, one of our neighbours has retired from headship in England. He used to work as a head teacher in more than one school, but what did he use to do while in the post? Did he use to deal with the facilities or did he only use to manage? Did he use to delegate, did he use to monitor classes? These are the things they should enhance our awareness on. (Guzin)

What soon has become clear during fieldwork that head teachers emphasise that professional development opportunities are not driven by the actual needs of the profession, in this case head teachers, but rather, focus on topics policy makers identify important. Chapter 4 has listed the methods the Department for Common Educational Services claims to use to identify the topics of the in-service training courses. The department seems to be working on the assumption that the topics are determined using methods that allows the topics to focus on the needs of the practitioners including school administrators. This assumption does not seem to be shared by participating head teachers, who share the view that one of the main weaknesses of the in-service training courses is their focus on subjects of little or no significance. The department might actually consider requests from practitioners, but it does not seem to be consulting them on a systematic manner to ensure that the organised courses concentrate on the actual needs of those in schools.

Apart from the sporadic requests from practitioners policy makers claim to consider, they also argue that one other method they use is to consider the recommendations of inspectors. As was demonstrated earlier, there is a serious evaluation problem in the system, which has made it very difficult, if not impossible, for policy makers to effectively use this method. As was also stated earlier, improving the inspection mechanism has been among the reform priorities and serious attempts have already been made to do so including restructuring to allow for a more school improvement based approach. This

initiative was very timely and should be applauded for touching upon a system-wide problem underlined by the majority of participating head teachers. However, it seems evident that for this initiative to work, stronger communication between the Commission for Inspection and Improvement and the Department for Common Educational Services must be developed. This is essential to ensure that appropriate professional development activities targeting the needs identified by the Commission for Inspection and Improvement are developed. Such communication is very unlikely to develop in the absence of a well-articulated mechanism to facilitate it. At the time of the study no such mechanism was under development.

Another issue raised by the head teachers relate to the delivery models. The majority of the professional development courses designed by the Ministry of Education and Culture are seminars or conferences of two hours or less. No mechanism has been found to be in place to support the transfer of new skills or knowledge gained during professional development to the workplace. There is unequivocal consensus among the participating head teachers that such courses are not useful and there is widespread call for a more diverse repertoire of methods. It is common for participating head teachers to strongly argue for longer courses taking place in universities, interactive sessions based on real-life problems, and opportunities for learning from their colleagues. Participating head teachers seem to be open to learning both from the problems faced by their colleagues in TRNC and from the realities of headship elsewhere.

Professional development should not aim to transfer knowledge, but be interactive. In some countries such activities take place in a number of selected schools. So what could it be? These professional development activities might be organised in a school or if they are organised in a central location, they might ask what we do on a topic and get us apply it in a school. Or to enhance our communication with other school head teachers, they might create opportunities

for us to do so. They might organise meetings for us to do so. (Tokay, primary school head teacher)

Real-life examples are necessary. For example they might show us what educational leadership and management is like in schools in other countries to enhance our awareness. It shouldn't be 'you do this like this, you do that like this'. (Guzin, primary school head teacher)

It is not logical to say 'come to Nicosia on the 15<sup>th</sup> and 16<sup>th</sup> of February and we will train you on these topics'. They might offer courses two times a week or for two hours a day in different universities. Of course they also need to find a way to encourage head teachers to take these courses. And this cannot be done by offering short courses taking place in a couple of days. It might offer a-year-long professional development opportunities with classes taking place once every week within a university, but this should be satisfying. They do not need to call it in-service training but need to ensure that the presenters are equipped with the knowledge and the skills to lead the head teachers. (Tarkan, primary school head teacher)

At the time of the study, there were no talks as to what other methods could be used. Nor was there any intention to facilitate 'lateral capacity building' among head teachers. In the absence of systemic efforts, there are bottom-up initiatives, which show variations in terms of their structure and culture. It has been found that an increasing number of head teachers are taking the initiative to establish groups as a means of learning from a wider group of peers across schools. A group of head teachers meet under the Association of School Managers established in 2004 under the leadership of a number of head teachers. Ozgur, one of the founding head teachers, explains his reasons for taking part in this initiative,



Head teachers were left alone; they are on their own. So it is a necessity. Why don't we share our experience, our problems, or even know each other? In most cases head teachers do not know each other. So it was important to establish such a mechanism. In addition, we also need something else. We are the members of the Teachers Union, which listens only to teachers, but take no notice of head teachers. This also creates the need to get together. But of course, 70 per cent is to do with improving education. Because they are not educating us, we should educate ourselves. We should organise seminars. We organised one a short time ago: Effective Management and Effective Leadership. So 70 per cent is to do with finding ways of improving ourselves, 30 per cent is to do with protecting our personnel rights, by resisting the union, to make them also listen to us.

Alev, a secondary school head teacher, echoes Ozgur,

We, under my and a number of my friends' leadership, already do such activities. This is separate from the Ministry. We try to organise get-togethers of head teachers to discuss the challenges we face in schools. These sometimes include some dinner functions. When we share our problems, we also hear about the solutions and benefit from each other's experiences. When we continue these meetings, I believe we improve ourselves ... When we put this more broadly, when school managers, educational managers get together, you learn about a problem that you don't have in your school and take precaution to avoid it or another head teachers might have come up with a solution to a common problem that you have not thought about and you benefit from his/her experiences. I believe you always benefit from sharing.

A similar initiative is evident in Famagusta, one of the districts in North Cyprus. It is similar to the Association of School Managers in the sense that a number of head teachers meet

regularly to discuss their problems and learn from each other. This group seems to meet regularly, normally about once a month. This initiative differs from the former in the sense that it is less structured with no constitution.

We, the primary school head teachers working in Famagusta, we are nine head teachers and we are very close. We consult each other even on things of little significance. We meet just like we have meetings with teachers. We discuss the developments, innovations, pedagogical methods. We talk about how we solve our problems and give each other tips. I believe we are successful. As I said the Ministry gave us some training but we cannot expect this training to be continuous. We need to improve ourselves, we also need to be in communication with others ... We meet regularly but when a head teacher calls for a meeting, she/he lets the managing head teacher know. We have a head teacher who facilitates the meetings. They say 'I would like to talk about a specific topic and seek others' ideas'. (Erdogan)

Exploring the effectiveness of these groups was beyond the scope of this research and thus there is a lack of significant evidence to suggest with utmost confidence whether they are effective or not. Nevertheless, evidence indicates that they lack strong emphasis on teaching and learning. This is in line with one of the main findings of this study that school improvement is mostly associated with improving the facilities and the equipment rather than teaching and learning. Examples Erdogan provides give an idea about the type of issues head teachers explore when they meet,

We used to use checked uniforms. One of our friends changed the school uniform. We thought it was good and created a good atmosphere in the school and we decided to change our uniform, too. Simple changes, it is like a housewife who changes her armchair, table and feels herself happy, we also do such

changes from time to time because we feel they have a positive influence on children. To install air conditioners in the rooms, to buy nice curtains for classes, to buy good equipment and toys, makes the school more attractive and makes students to feel they are in a serious environment. They feel they are valued and they work harder. When a school does something new, the others also see it and work harder to reach their standards. This increases the effectiveness of our schools.

Another issue raised by the participating head teachers relates to the capacity of the presenters. For many years, the majority of the presenters have come from Turkey. Only a small minority has been from TRNC and almost none, except when the presentation was part of a wider programme supported by the British Council or the Fulbright Commission. Documentary analysis revealed that when presenters are from Turkey or TRNC, it was common for the same presenters to deliver professional development courses many times with no criteria on which the decision to reinvite the presenters is based. This raises the question of relevance and possible applicability of the knowledge presented. It became clear at the early stages of the fieldwork that head teachers question the competence of the presenters, particularly those who come from Turkey, to enhance their knowledge and skills. There is widespread perception that the presenters who come from Turkey normally lack the awareness of contextual realities and of the differences between Turkish and TRNC educational systems. This, they underline, results in presentations that lack relevance to the challenges they face and seriously limits the appropriateness of the solutions and the application of theories.

We are called to participate in in-service training courses at specific periods, which last for an hour or two. Often these courses are given by experts from Turkey or from the Near East University. It is not possible to say they are very effective. (Ebru, secondary school head teacher)

It depends on the relations of the Ministry. If there are people from Turkey who they want to have a holiday, they call them. They come, have fun, and the Ministry calls us for a seminar. They say something and they leave. It is a bit rude to express it this way but it is like this. The trainers need to be people who can give you something. If you call teachers who have 23 or 24 years of experience and present them with trainers who have no experience in schools, this is an insult. The trainers should be full of knowledge and skills so that the head teachers try to learn something from them. They must give attention to these issues but unfortunately no attention was given until today. From time to time good courses are organised; we should not be too pessimistic. (Alev)

Examination of the in-service training files reveals that the Ministry of Education and Culture has recently reviewed this policy. It has been observed that at the time of the study an increasing number of trainers was chosen from TRNC Universities. Nevertheless, no criteria have been found as to how these presenters were chosen at the time of the study, nor have been one observed to be under development. Evidence also suggests that trainers have long been chosen purely from academic circles with an exception of a few cases. This was still the case at the time of the study. No further evidence has been observed to suggest that experiential knowledge is taken into consideration. This is likely to give the message to the head teachers that experiential knowledge is inferior academic qualification.

## Conclusion

This chapter has examined the current profile of head teachers and the professional development opportunities available for head teachers. It has demonstrated that headship is an operational rather than a strategic position, and that professional development is carried out in a sporadic fashion rather than approached in a well-articulated manner. The chapter has argued that for the reform agenda to succeed, the position needs to be redefined to focus head teachers on teaching and learning. Head teacher preparation and professional development need to be restructured to build the capacity of head teachers to enhance organisational capacity and pedagogical development. In the next chapter, I discuss how a 'glocalised' response that is grounded in international literature and local realities could be achieved.

# **Chapter 6**

## **Summary of the Findings and Discussion**

### **Introduction**

The previous two chapters have documented some of the critical challenges that must be addressed if the quality of education in the TRNC is to improve. This chapter summarises the main findings of this study. It makes recommendations both as to how the system could be improved and how the capacity of head teachers could be built so that they lead pedagogical development and organisational capacity-building. The position adopted here places greater priority and emphasis on the perspectives articulated in local research, which is at times also used to question how global reform models and policy-oriented conclusions need to be modified to fit the local context. Thus, it is based on the belief that policy-oriented, internationally-aware but locale-specific research is needed to play a directive role in the development of a research informed education reform package. For this, "a comprehensive understanding of both the local and the global is needed ... without falling prey to the dangers of uncritical international transfer" (Crossley & Holmes, 2001: 396).

### **The Reform Agenda within Its Socio-political Context**

One of the objectives of this study was to examine the nature and objectives of the reform agenda within the socio-political context in which it was introduced. The TRNC is an instance of 'vernacular globalisation' in which reform objectives are influenced by local histories and narratives of a nation as much as by the global imperatives such as the heightened need for skilled citizens who are able to enhance their intellectual capital to benefit from, and contribute to, the knowledge society, while at the same time working

against it.

The reform was developed and implemented in a very 'glocal' context characterized by very particular problems such as the capacity problem, heightened by little experience within global knowledge societies, a serious risk of escalating the brain drain from the TRNC to European countries, and the large number of unskilled recent migrants with very particular and complex needs. The reasons for change are both local and global: the need for skilful, democratic, peaceful, tolerant citizens also able to operate within changing environments; combined with the need for citizens sensitive to socio-political issues in Cyprus and willing to work for the benefit of residents in the TRNC. An educational system must be developed that has the capacity to achieve sustainable improvement to enhance student learning.

The current policy rhetoric is in agreement with 'travelling' global education policies, but there seems to be a significant degree of dissonance between espoused and enacted policies. Although there isn't sufficient data to claim with utmost certainty, since it was beyond the scope of this study, how widespread this feeling was, it seems that the stakeholders do not feel their ideas become part of the policy-making process. This is a serious weakness that needs to be addressed for the reform to set in. Policy needs to be a joint accomplishment of multiple actors for it to be implemented and a collaborative approach needs to be achieved for sustainable large-scale reform to be achieved (Levin, 2007). Evidence also suggests that the reform initiatives are occurring in the context of public criticism of schools to some extent, and of former governments to a larger extent, for failing to improve education in relation to educational developments happening across industrialized countries.

The allocation of blame to teachers and former governments is a risky business for two reasons. First, it is particularly difficult to achieve collaboration among stakeholders in a

culture of distrust. Second, it may make it difficult to see the ongoing and historically derived challenges facing the country summarized earlier. The lack of recognition at policy level of the inevitable influence of these challenges on any reform initiative is perhaps one of the most striking findings of this study. Two fundamental changes to the reform strategy are needed. First, it is imperative to employ a more collaborative approach to educational reform and to ensure that the Ministry of Education and Culture builds trust and positive relationships among the key stakeholders such as teachers, school managers, teacher union representatives and parents. For this to happen, mechanisms for consultation with stakeholders need to be established. These might include meetings which regularly bring together the Ministry with key stakeholders and where genuine discussions on the problems are held and the decision on how to address these are taken collectively. It would also be useful to agree on a set of goals to achieve over a set time period for all stakeholders to ensure a climate free of strikes, which arise too often because of conflicts between the Ministry of Education and Culture, teachers and teacher unions. Second, it is important to acknowledge, understand and manage socio-political challenges, which are part and parcel of any reform movement in the TRNC. One of the challenges examined further in this thesis was leadership capacity, with particular emphasis on head teachers.

## **The Domain of Headship**

This study has set to examine the current domain of headship in the TRNC in relation to the external system infrastructure with the objective of exploring how well these practices are suited to the aims of the reform initiative. I have aimed, in particular, to investigate the profile of head teachers, their main roles, the policy context in which they operate, and the main challenges they face. In regard to this object, I found that head teachers operate within a highly centralized system which lacks a strong focus on teaching and learning and where improvement efforts concentrate on distal variables at the expense of teaching and learning. This is a condition detrimental to reform efforts. The message from



international educational change and school improvement literatures is clear: in the absence of a strong, sustained focus on the classroom as the locus of change and of efforts to build school capacity to improve student learning, even the best reform efforts are doomed to fail (Fullan, 2005, 2006; Harris & Lambert, 2003; Hopkins, 2007; Levin & Fullan, 2008).

Head teachers are appointed on the basis of their teaching experience, while their leadership potential and the needs of the schools do not seem to be taken into account at the time of their appointment. The assumption is that teaching provides sufficient experience for leadership. There is clear message from the research data that there is no prerequisite leadership preparation for head teachers, and no well-articulated professional development program is available to develop their leadership capacity once they have been appointed to headship. There is no expectation that head teachers improve their capacity to lead, and there seems to be a very large professional development and interrelated incentive problem buried in the TRNC education system. This is at odds with the international literature claiming that the initial preparation and continuing professional development of school leaders is fundamental for school improvement (Brundrett & Dering, 2006).

It has been found to be common practice for head teachers to change schools and to base their decisions solely on where the school is located and how far it is from where they live. While this may mean high turnover for some schools, it may mean leadership stagnation for others, as head teachers do not leave schools situated in desirable locations until they retire. In this sense, relocation serves personal aspirations of head teachers only and represents unplanned succession with the best interests of head teachers in mind. This practice is supported and monitored by Teacher Unions to prevent favouritism based on close relationships with government officials when relocating head teachers. Head teachers seem to share the view that government officials cannot be

trusted to be objective in the absence of such monitoring.

When examined from an organisational perspective, this practice may not be as ideal as it is viewed by head teachers and union representatives, and might in fact be damaging to reform efforts. It is common for head teachers to face the enduring influence of their predecessors (Draper & McMichael, 2000; Rooney, 2000; Walker & Qian, 2006; Weindling & Dimmock, 2006). The message from these studies is clear: understanding and planning the process of leading over time is fundamental for sustainable school improvement (Hargreaves & Fink, 2006). This suggests that to achieve long-lasting school improvement, the reallocation policy needs to be reconsidered to move towards planned leadership succession, but do so in a way that also addresses personal aspirations and the dangers of crony capitalism.

What is perhaps most striking is that there is no credible school evaluation and system monitoring. It has been found that head teachers share the view with policy makers that the inspection mechanism stopped working, and its restructuring is crucial for school improvement. It is also common for head teachers to promote performance management. The assumption is that inspection and performance management are compatible with the context of the TRNC. Nevertheless, it is very likely that teacher unions, who have long argued against evaluating individual teachers' and school leaders' performance and distributing rewards accordingly, and to whom teachers look for protection from such developments, would resist such practices. As head teachers and policy officials have underlined, the power of unions cannot be undermined in the TRNC; unlike in countries such as England where they have appeared marginalised (Stevenson, 2007), in the TRNC they have often exerted significant influence on policy. This suggests a potential conflict between the interests of teacher unions and performance management, and it seems unlikely that performance management can be implemented successfully in the TRNC, where teacher unions hold exceptional bargaining power. This might suggest that

school evaluation rather than teacher or leader evaluation might be more doable and an evaluation model that primarily serves the purposes of school improvement, provision of appropriate support, and the development of evidence-based policies might be more realistic.

In the current infrastructure, head teachers spend a significant amount of time dealing with bureaucratic and operational matters, fund-raising and fiscal management, bureaucratic communication (in particular with the Ministry of Education and Culture), and management of teaching and learning. Instructional and staff development seem to be beyond their remit and they do not act as instructional leaders. Chronic deficiencies in the system seem to make it almost impossible for head teachers to maintain good teaching standards in schools. These deficiencies include, in particular, a strong infrastructure of pressure and support to improve pedagogy and a transparent promotion policy of the Government. It has been found that it is common for head teachers to believe that the Ministry of Education and Culture fails to reward good practice and take appropriate action when there is a problem. This suggests that the first and probably the foremost step that any reform initiative needs to take in the TRNC is to make the role of headship more doable. This demands important changes at system level to free head teachers from fund-raising and bureaucratic burdens.

To address the problem of fund-raising, the Ministry of Education and Culture needs to increase the available resources to be used. Significant educational reform, more often than not, requires additional resources (Levin, 2007). The recurrent salaries affect the fiscal situation in the overall education sector. The issue is not only the salary level of public sector employees, in particular the Ministry personnel, teachers and school administrators, but the overcrowded public sector. Decreasing the salary burden seems imperative. One way of addressing this problem could be to merge schools close to each other to form larger organisations and to merge small Ministry departments to form larger

operational units with lower administration costs (World Bank, 2006).

Second, the collaboration between schools and the community needs to be enhanced by building sustainable partnerships between schools, employers and universities through which employers and universities make financial and non-financial contributions to schools. This study has found that many schools already generate financial and in-kind contributions from employers with the help of the School Parents' Association. There is enough evidence to suggest that this contribution is not a result of any well-articulated long-term partnership. Instead, it is sporadic. The study has found only one case where an employer has made and still continues to make a significant financial contribution to a specific school. The school was built with funding provided entirely by the employer, who underlines that there are no incentives to encourage other employers to do so. Establishing such inter-organisational partnerships necessitates measures to encourage and support external agencies and schools to engage in mutually beneficial partnerships and awareness raising as to what such partnerships might involve. School Parents' Associations are well positioned to carry out this role as they are already heavily involved in fund-raising. Such a move would require two things: (a) distributing leadership and sharing authority with School Parents' Associations; and (b) building the capacity of such associations to employ a more strategic position.

Another issue that relates to the intensity is the amount of communication with the Ministry of Education and Culture. There are some practical and relatively easy improvements that could be made to simplify bureaucratic communication. First and foremost, schools and the Ministry of Education need to move to electronic communication. This would eradicate some of the problems faced by head teachers, such as the loss of parcels in the post and late arrival of letters. Second, the Ministry of Education and Culture needs to release some of the central control by giving head teachers more autonomy to communicate directly with external organisations without the Ministry of Education and Culture acting as

an intermediary. Third, bureaucratic communication needs to be better structured to reduce the amount of communication. One such measure could be to request an annual improvement plan with a list of extracurricular activities and improvements to building and facilities in the beginning of each academic year, which the Ministry of Education and Culture approves, and a school self-review at the end of each academic year. In addition, the Ministry of Education and Culture could create an online database of information, information such as recent innovations, professional development opportunities for teachers and school administrators would be available. Such a website could also host forums on topics where the Ministry would like contributions from practitioners.

## **Professional development of head teachers**

I have also aimed to investigate what professional development opportunities are available for head teachers once they have been appointed, and to document head teachers' views on such opportunities. In regard to this objective, I found that there are significant problems with the professional development opportunities for head teachers. These relate to the content, the delivery methods and the capacity of the presenters. First, professional development courses are organised exclusively by the Ministry of Education and Culture. Despite the policy rhetoric that the topics of these courses are chosen in consultation with practitioners and inspectors, head teachers believe these opportunities are not driven by the actual needs and many do focus on topics of little or no importance rather than areas that could truly enhance their leadership capacity. The Ministry of Education and Culture might actually consider requests from practitioners, but it does not consult practitioners in a systematic manner to ensure that the professional development opportunities concentrate on their needs.

Second, professional development opportunities are limited to seminars and conferences exclusively carried out in venues outside schools, although head teachers prefer longer

courses taking place in universities, interactive sessions based on real life problems, observations in schools in TRNC and beyond, and opportunities to learn from their colleagues. International research evidence lends clear support to such practices. The message is clear: the development and transfer of instructional skills into the workplace requires on-the-job-support (Joyce et al., 1999; Joyce & Showers, 1995). Separating professional learning from the context in which it will be applied with the aim to pass on decontextualised knowledge, and organising professional development entirely away from the school setting with no or limited opportunities for on-the-job-support, fail to influence professional knowledge and professional practice (Duncombe & Armour, 2004). Professional knowledge is knowledge embedded in professional activity and cannot be separated from the context of practice in which it is constructed (Sternberg and Horvath 1999) and learning from and with peers is a powerful strategy for school improvement (Fullan, 2006).

The first component of this strategy is already in place; however, there is evidence to suggest that its effectiveness is often questioned by head teachers. It is thus imperative that workshops and conferences offered in venues outside schools are improved to ensure that they focus on topics head teachers need to know to be able to lead instructional development and organisational renewal, and that these topics are identified in true partnership with head teachers. These might include new initiatives that could be used to enhance classroom instruction, organisational change and renewal, teacher learning, and organisational conditions that support instructional improvement. It is also important to use some of these workshops to discuss how well schools are meeting their goal of raising student achievement and why.

There are also signs of the second component, lateral capacity building, evident in peer-led, small, head teacher groups, which provide a good starting point. Nevertheless, it is imperative to encourage other schools to form small clusters of such support groups and

to ensure that the key conditions are achieved for these groups to become 'learning communities' where head teachers learn from each other and support each other to build on what has been learnt. Learning communities are often discussed as a means of teacher professional development, but they are also applicable to head teachers. There are a number of key conditions to be met to ensure these groups provide a platform for head teachers to learn from each other. These are: (a) a strong and sustained focus on student learning and collective responsibility to improve it (Andrews & Lewis, 2007; King & Newmann, 2001); (b) collective reflective inquiry through regular examination of using assessment data and material artefacts to evaluate progress and problems over time (Hargreaves, 2003); (c) site-specific individualised coaching; and (d) mutual trust, respect and support (Bolam et al., 2005; Stoll et al., 2006). The existing groups seem to lack some of these features at the moment. It is key that existing and new groups are supported to move beyond networking and socialising to be a place where the members challenge as well as support each other to enhance their capacity to help teachers improve instruction. When implemented successfully, these support groups have been found effective in other contexts (Herriot et al., 2002). The third component, site-specific individualised coaching, which supports head teachers to implement the new initiatives, is missing entirely. Experienced head teachers could be encouraged to provide on-site support to their peers in need of more support. It is critical that the support provided is based on an actual need to adapt support to variation among head teachers. Partnerships with universities could be particularly useful here, which could provide another resource to tap for individualised support.

The third issue relates to the capacity of the presenters, who used to come mainly from Turkey. Head teachers believe that because the presenters are not aware of contextual realities and of the differences between Turkish and TRNC educational systems, the presentations are not relevant to the challenges they face and the solutions and theories are not applicable to the context of the TRNC. The Ministry of Education and Culture

seems to have recently reviewed this policy, choosing more presenters from local universities. Though this might improve the problem of contextual relevance, it raises questions as to how compatible this strategy is with the overall reform objective of moving closer to current trends in Europe. If the TRNC is to engage successfully with such trends, a comprehensive understanding of these trends is required. This seems difficult to achieve with a reform strategy that does not engage with international expertise, but instead focuses on a pool of expertise derived from Turkish and TRNC universities. Participating head teachers have also underlined that they would embrace mechanisms to enhance their awareness of different strategies used in different countries. This strategy is also at odds with such calls and needs to be improved.



# **Chapter 7**

## **Conclusion**

### **Introduction**

I started my doctoral studies with a clear goal: to explore the impact of an intervention on the development of cognitive and metacognitive skills in the higher education context. Soon after I started the course work, it was clear that my interests had changed towards sustainable systemic educational reform. By the time I completed it I knew I was going to examine the recent educational reform initiatives in the TRNC, with a particular emphasis on identifying the current profile of head teachers and ways of building their capacity to lead instructional development and organisational improvement as well as improving the system capacity to pressure and support them to undertake this role effectively. The previous chapter has demonstrated that the research questions raised in Chapter One has been addressed by summarising the main findings and making suggestions as to how the capacity of head teachers could be improved for the reform to be realised. This chapter concludes this investigation. It addresses the originality of the study to showcase the contribution it makes to knowledge, outlines some of its main limitations, and sketches how my academic persona has been constantly shaped and reshaped during the course of my studies.

### **The Originality of the Study**

Addressing the originality of this study is important to ensure that the study has made a significant contribution to the scholarly knowledge on sustainable educational reform in the TRNC. In the case of the research originality means at one level exploring an old topic within an unknown context, at another it means exploring the unknown, and yet at another it means adding to scholarly knowledge literature in a way that has not been done before.

There is rapidly increasing wealth of knowledge on educational reform and leadership

capacity building primarily shaped by theoretical and empirical contributions from the United Kingdom, the United States of America, Canada, and Australia. Some studies carry the topic to other parts of the world, testing the applicability of the North Atlantic argument to other contexts; these are still not common. As Chapter One has demonstrated, no study has been carried out on leadership capacity building for sustainable educational reform within the context of the TRNC. First, this study derives its originality from its focus on an old topic in a context that is largely unknown within academic circles; no studies had been carried on the topic prior to this study. Second, the study generates evidence on the current domain of headship in the TRNC in relation to the external system infrastructure and the national framework for building head teachers' capacity to lead in the TRNC, two interrelated topics that have not been studied before. In doing so, it derives its originality from its focus on the unknown. In addition, the study questions the truthfulness of the scholarly literature on education on the island, demonstrating how the education systems on the island are misrepresented, reducing education on the island to the one in the RoC, projecting homogenised scenarios that lead to misleading constructions of education in Cyprus. By generating evidence about the issues facing the invisible education system in Cyprus, the study also derives its originality from the contribution it makes to the scholarly knowledge on educational systems in 'Cyprus' in a way that challenges the current construction of an imagined Cypriot education system that is not recognisable to residents of the TRNC.

Among major criteria for publication in academic journals is the degree of research originality. Cryer (1996) argues that being considered "potentially publishable" would also provide an acceptable claim for originality. By the time this dissertation was being written, two articles have already been published by international refereed journals. One of these articles was informed by Chapter Four, which focuses on the reform agenda within its socio-political context, and the other was informed by the Methodology Chapter. These publications lend further evidence for the originality of the study.

## Limitations of the Study

During the course of this study, I faced a number of limitations. I managed to minimise some of these by working a little smarter and more creatively. Some were beyond my control, and I had to accept the fact that every research study has its own limitations, but the limitations are greater in contexts that are largely unknown and not understood. These were mainly due to the lack of scholarly knowledge on the historical and current TRNC education system and to incomplete policy documentation.

I faced possibly the biggest obstacle when I decided to discuss the current education system in the TRNC within its historical development, first relating to pre-1963, and then to post-1974. It soon became evident that available documents have not been previously synthesised in such a way. I synthesised these primary documents, some dating as far back as 1900. Living in London at the time had obvious benefits, such as access to the National Archives, without which I would not be able to have access to the significant literature on education system on the island before 1963. This was relatively easy compared to working with literature on the TRNC education system after 1974, as relevant literature in the National Archives is well organized and accessible. It soon became evident that I would not be able to truthfully represent the developments in the TRNC education system after 1974, due to the lack of readily-available resources. The only way to overcome this obstacle was to synthesise the primary documents largely kept in National Archives in the TRNC. As available documentation is not managed electronically in the National Archives, this errand would have required a lot of time to manually search the resources; my time on the island at the time of the study would not allow me to do so. Demonstrating how the education system has evolved in the last generation would add to the study, particularly because it focuses on a largely unknown context. But because it was beyond the scope of this research, I have decided to leave it out.

The second limitation was to do with data collection and the absence of some official documentation. Soon after the study started, it became evident that data on the number of professional development courses that took place between 2000-2006, the topic and duration of these courses, and the presenter or trainer, would be very helpful in providing further evidence to the weaknesses of these courses claimed by the research participants. When I approached the Ministry of Education and Culture for this data, I was informed that it does not exist, but that they would allow me to examine the official professional development files which were not in electronic format. It did not take long to realise that the files would not yield data that would truthfully lend evidence to the dimensions introduced by the research participants for several reasons: the structure of each document related to the professional development courses differed, in that information available for some documents was missing for others. After spending days going through these files in the Ministry of Education and Culture, I have decided not to quantify the data as such a representation would not be truthful.

Because I was not based in TRNC during this study, some data was collected when I was on the island for a limited time period and some were collected by telephone interviews when I was in London. Being in TRNC for a more extended period would certainly have been advantageous as it would have allowed more exposure to the real life of participants, to unrecorded observations and to events at the time of happening. By nature, telephone interviews did not provide access to such opportunities. Such data would be particularly useful in understanding the main tasks head teachers carry out and the challenges they face and would provide an invaluable opportunity for data triangulation. In retrospect, if I carried out this study again, I would spend more time in the field and would include observations in research sites and shadowing of head teachers to ensure first-hand exposure to events at the time of happening. This would certainly lead to richer data, which would provide more detailed understanding of the phenomenon, but I trust it would not lead to different findings.

## **Plans for Dissemination and Suggestions for Further Research**

### **Plans for Dissemination**

Two articles have already been published. The first was informed by the Methodology Chapter and was published in *Qualitative Research* in 2007 and the second focused on the reform initiative reported in this study in its socio-political and socio-economic context and was published in *The International Journal of Educational Development* in 2009. Another article that focuses on the domain of headship in TRNC is currently being reviewed by *Compare* and the fourth, which deals with continuing professional development opportunities for head teachers is under preparation for *School Leadership and Management*.

There are plans also to disseminate the findings in TRNC. This could take several forms and is intended to reach a diverse audience to include academic personnel in universities in TRNC, and the key stakeholders including head teachers, teachers, policy officers, teacher unions and parents. First, I am interested in publishing an article in *Cyprus Studies*, a journal published by the Eastern Mediterranean University. This would provide an opportunity to disseminate the findings to academic audience in TRNC. This is particularly important because as I described earlier, it is often the case that trainers are chosen from universities in TRNC and the findings would support their understanding of head teachers' views on their continuing professional development and of the challenges they face. Such critical understanding of what works and what doesn't from the perspectives of head teachers, the expected beneficiaries of continuing professional development, is expected to lead to better professional development opportunities. It is also worth noting that access to international journals is particularly limited in TRNC. Universities do not often subscribe to a large number of international journals and hence, the articles I have published in international journals are not readily accessible to those working in TRNC. This makes it even more important to publish in an academic journal in

TRNC as well.

Second, I would like to disseminate the findings to key stakeholders through a seminar or a workshop. As I have explained earlier, common objectives to which multiple stakeholders ascribe to is important particularly in TRNC and hence it is important to ensure that they are supported to understand what head teachers believe needs to be improved to ensure that they are better supported to lead pedagogical development and organisational capacity building to support sustainable educational reform. Such understanding is expected to lead to research informed planning for system improvement that is supported by a diverse range of stakeholders. Third, a book could be published in Turkish by a local publisher. It is important to note that this book needs to be published in Turkish to ensure that it reaches a wide enough audience.

## **Suggestions for Further Research**

That policy makers and practitioners operate in a 'knowledge-poor' condition in the TRNC is one of the findings of this study, for which a natural policy implication is to move towards a 'knowledge-rich' condition, by commissioning more research and by generating data on student learning. I have also demonstrated in the Introduction that it is imperative that more research be carried out on the education system in the TRNC to build a knowledge base more representative of the north of the island and more recognisable to residents of the TRNC. This dissertation would be incomplete without a number of suggestions for further research.

It would be imperative to investigate the reform initiatives in the TRNC through longitudinal studies, so that we can understand how local context changes and shapes international change and improvement policies as much as it is moulded by them; longitudinal studies would also reveal how this process of co-construction is influenced by the changing

capacity of the education system in the TRNC. I would also suggest that this study looks at how the reform initiatives are shaped by the local school context during implementation while the school context is being shaped by reform. By doing so this study would further the arguments of Datnow and her colleagues, who argue that co-construction is part and parcel of any reform agenda, and would examine whether co-construction is double-loop in international contexts.

I would also like to suggest that a study could be conducted on how much of the international discourse of education for the knowledge society is applicable to the TRNC and how much of it is imagined with teachers, school leaders, parents, teacher unions, and policy officials. Such a study would clarify how widely the policy discourse is owned or perceived as relevant to the current state of the education system and the socio-economic realities in the TRNC. One other study I would like to propose is the examination of how much of the policy discourse is actually lived and how much of it is policy rhetoric. As I discussed earlier in this chapter, there seems to be a significant degree of dissonance between espoused and enacted policies, in that the policy officials do not seem to practice what they preach. This is an area that is worthy of a more comprehensive analysis.

I also recommend that the implications of this study could be further investigated with the research participants. This could take the form of a workshop, using brainstorming in small groups as the main method of investigation, to allow research participants to provide constructive criticism that would inevitably enrich these implications. It is important to note here that for this study to bear policy-relevant results it is imperative that research participants discuss each implication in small groups of teachers, head teachers, teacher union representatives, and policy officers. It is also crucial that this discussion be held within a non-threatening, well-facilitated environment designed to encourage constructive criticism and productive communication. It is among my short-term plans to investigate the possibility of carrying out this study.

## A Personal Reflection

When I began my doctoral studies, I was a different person in terms of how I understood and approached the available literatures, educational research and the change process. I started with a clear mindset. I was determined to test an intervention through which I was hoping to change the way my students learned and the way my department at Eastern Mediterranean University operated. This would be a straightforward attempt to determine whether the intervention worked or failed. The study would be original, as it would investigate a combination of factors that had not previously been considered. The kind of doctoral experience I had in mind when I started ticked all the right boxes. I did not realize that it would change me as a person and as a researcher.

These assumptions were soon challenged. My precision about my objective, the way I approached change and educational research ontologically and epistemologically, was blurred. The first two modules with one of my supervisors, Pat Thomson, proved that my experience would be far from what I imagined it would. I remember vividly how I was challenged to reflect on my philosophy of research, my research interests, and the way I work with literatures in one of these courses and how I came to confront my naïve ideals about the change process through exposure to complexities and dilemmas. I learnt early from Prof. Thomson and later from Prof. McGrath that simplicity in academic research is deceptively attractive, a journey destined to failure. I came to acknowledge and accept the complexities. By the time I completed the taught modules, I was able to manage complex thinking and in fact liked it. It was my increasing awareness and appreciation of change as a messy, complex business that has influenced how I think today. Before I started my doctoral studies, what I knew looked straightforward to me. By the time I finished the taught elements of my doctoral studies, I was fully aware of the fact that the more I learn the more I would appreciate how little I know. I have decided to focus on a topic that derives its strength from its complexity.



Early in my doctoral studies, I also realised that in the real world, I would not have the luxury to fully engage with every research paper and every book. What would be necessary was not uncritical engagement with many arguments, but critical conversations with a community of scholars. It was mine to decide who to have a brief conversation with, who to avoid for various reasons, who to engage with more fully, and how to make sense of the already established theoretical conceptions and empirical findings in relation to the story I was telling. Reflecting on my experience of working with a diverse range of literatures such as school improvement and effectiveness, educational policy, large-scale educational reform, preparation and development of head teachers, and comparative education, I learnt that it is not easy to ensure that each chosen scholar makes a critical contribution to my argument. This is in line with what Kamler and Thomson (2006: 38-39) argue when they use the metaphor of a dinner party to describe the literature work,

The doctoral researcher invites to the table the scholars she would like to join her for a conversation over the evening meal. The emphasis is on the company and the conversation that happens at the table. The candidate has selected the menu, bought the food, and cooked the dinner which she offers her guests. As host to this party, she makes space for the guests to talk about their work, but *in relation* to her own work. Her own thesis is never disconnected from the conversation, for after all it lies on her table. It is part of the food the guests eat, chew and digest ... The doctoral researcher can make her dinner party a dull affair where all the guests speak one after another, but engage in little interaction, debate or challenge. Or her soirée can be one in which she serially holds the floor, ridicules all of the guests and prevents them from talking back or to each other ... Getting the mix right is not easy.

Soon after I started to make decisions about which literatures to include at what level and which scholars to invite to my dinner party, I realised that this was taking the first step

towards becoming critical. Through my engagement with the selected literatures, which involved decisions such as what aspects of a text to stress and what aspects to downplay, I came to understand the major debates and how they complement my work.

By the time my doctoral research started, I was more critical and better prepared to deal with the major debates in the field. I was also a more reflexive scholar and approached my own work with the same critical lens I used to examine the works of others. This meant asking interrogative questions when reading my own work and visiting the research data. It was at this point in my personal development that I took the courage to revisit a research paper I had written for one of the taught modules reflexively, which was published before I started to write this dissertation. I have learnt critical self-interrogation, which has been very helpful since I embarked on this dissertation. Soon after I started data collection for my doctoral research on the TRNC education system while living in London, I came to understand more fully with the help of Professor McGrath the difficulties involved in international research and the complexities in critical application of international policies and ideals to local contexts.

Writing this dissertation has also helped me to realise that academic writing is not and cannot be an impersonal matter. Rather, as knowledge and meaning are social constructs influenced by the persona of the researcher, academic writing is a way of creating and communicating a persona. There are striking differences between how I approached academic writing when I started my doctoral studies and how I do so today. I am no longer the person with a simplified notion that academic writing should be impersonal, who was not comfortable with using the word 'I', who avoided creating a persona. I have learnt the importance of building a credible persona in Kamler and Thomson's (2006) terms. This is what I hope this dissertation conveys, as well as the relevance of the ideas and the significance of the research findings.

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# Appendices

## Appendix A: Summary of Articles and Reports

The table below summarizes the articles and reports included in this research. In the table I use the terms nationalist to mean articles that equate 'Cypriots' with Greek Cypriots and 'Cyprus' with South Cyprus, and exclusive to mean articles that exclude 'Cypriots' other than Greek Cypriots. Misrepresentative means presentations that purport to present a universal picture but are in reality the view of one community only.

**Table 5: Summary of the articles**

Title of journal	Number of articles	Focus of articles	Representation of education in 'Cyprus'
Education Media International	2	Integration of ICT in teaching and teaching education	Nationalist and exclusive
International Journal of Inclusive Education	1	Inclusive education	Nationalist and exclusive
International Journal of Educational Research	1	Democratic Values and Attitudes	Nationalist and exclusive
The Internal Journal of Educational Management	4	a. Higher education institution at the transition stage from college to university b. Teacher perceptions in relation to the effectiveness of school leadership c. Strategic planning for education d. Elementary principalship	a. Nationalist and exclusive b. Nationalist and exclusive c. Nationalist, exclusive and misrepresentative of historical development of education on the island d. Nationalist and exclusive
Journal of Educational Administration	2	a. Teacher job satisfaction b. Educational leadership and democracy	a. Nationalist, exclusive and misrepresentative historical development of education on the island b. Acknowledgement of the limits of the paper's scope as pertaining to the South only
Intercultural	1	Current condition of	Nationalist and exclusive

Education		education in relation to multicultural education	
European Journal of Special Needs Education	1	Implementation of new policies in inclusive education and barriers to inclusion	Nationalist and exclusive
European Journal of Education	2	a. Current condition of education in 'Cyprus' and the barriers preventing educational improvement b. Educational research in 'Cyprus'	a. Nationalist, exclusive, and misrepresentative historical development of education on the island b. Nationalist and exclusive
Educational Studies in Mathematics	1	Teacher concerns in relation to the implementation of new curriculum	Nationalist and exclusive
British Journal of In-Service Education	1	Needs of school leaders	Nationalist and exclusive
Educational Review	1	Attitudes to education from teachers of different age groups	Nationalist and exclusive
Teaching in Higher Education	1	Teacher education	Inconsistent recognition of Greek Cypriots as a separate community and misrepresentative historical context
Science and Education	1	School Curriculum	Nationalist and exclusive
Quality in Higher Education	1	Teacher views on the aims of higher education	Nationalist and exclusive
Higher Education	1	The demands for higher education	Nationalist and exclusive
Higher Education Policy	1	The demands for higher education	Nationalist and exclusive
Economics of Education Review	1	Rates of return to higher education	Nationalist and exclusive
Educational Research	1	Teacher job satisfaction in relation to school organization and administration	Nationalist and exclusive
Reports	2	a. European Higher Education Area – the Bologna Process b. The implementation of the Socrates programme	Nationalist and exclusive

## Appendix B: Permission Letter (in Turkish)



**The University of  
Nottingham**

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Talim Terbiye Dairesi Müdürlüğü  
Milli Eğitim ve Kültür Bakanlığı  
Lefkoşa

28 Haziran 2006

Sayın [Policy officer]

Bildiğiniz gibi Nottingham Üniversitesi'nde Eğitimde Liderlik dalında doktora çalışmalarımı sürdürmekteyim. Geçtiğimiz Eylül ayında Kıbrıs'a geldiğimde tez araştırmamı bakanlığınızın uyguladığı hizmet içi eğitim stratejisi üzerine yapmak istediğimi belirtmiş ve yakın geçmişte başlamış olan eğitimde değişim arayışları ve hizmet içi eğitim konusunda elinizde bulunan dokümanlar hakkında bilgi istemiştim. Tekrar yardımlarınız ve yönlendirmeniz için çok teşekkür ederim.

Geçtiğimiz Ocak ayından beridir üzerinde çalıştığım araştırmanın hazırlıklarını tamamlamış bulunmaktayım. Aşağıdaki detaylarını bulacağınız tez araştırmasını yürütebilmem için gerekli izni verirseniz çok memnun olurum.

### **Araştırmanın Amacı**

Bu araştırmanın amacı Kuzey Kıbrıs Türk Cumhuriyeti'nde sürdürülmekte olan hizmet içi liderlik eğitim stratejisini belirlemek ve bu stratejinin eğitimde sürdürülebilir değişimin sağlanabilmesi için nasıl geliştirilmesi gerektiğini incelemektir. Toplanan veri doktora tezimin ve yayınlanmak üzere yazılacak makalelerin temelini oluşturacaktır. Buna ek olarak bakanlığınız tarafından gerekli görülürse bakanlığınıza sunulmak üzere bir rapor hazırlanacaktır.

### **Metod**

Bu çalışmada nicel ve nitel veri toplama ve analiz yöntemleri kullanılacaktır. Okul müdürleri ve baş muavinlerine anket yollanarak Kuzey Kıbrıs'taki okulların liderlik profili konusunda statistiki bilgi toplanacaktır. Okul müdür ve baş muavinleri eğitim sisteminde üstlendikleri liderlik rolü, liderlik konusunda liderlik konumuna atanmadan ve atandıktan sonra aldıkları hizmet içi eğitim konusunda nicel içelikli 90 dakikayı geçmeyen söyleşiler yapılacaktır. Bu söyleşiler uygun görülürse teybe çekilecektir. İkinci söyleşi ancak gerek görüldüğü takdirde yapılacaktır. Öğretmen sendikalarından ve bakanlığınızdan seçilecek kişilerle de yukarıda belirtilen konular hakkında söyleşiler yapılacaktır.

## **Gizlilik ve Hitap**

Toplanan veri tamamen gizli olup veriler sadece arařtırmacı ve hocaları tarafından incelenilecektir. Arařtırmaya katılanların kimlięi takma isimler kullanarak gizlenecektir. Gerekirse řahısların isim olmadan kimlięini ortaya ıkarabilecek unsurlar (ile, okul gibi) silinecektir.

## **Katılım**

Bu arařtırmaya katılım tamamiyle gönüllüdür. Katılımcılar arařtırma bařlamadan önce arařtırmanın ierięi hakkında bilgilendirilecek ve arařtırma bařlamadan rızaları alınacaktır.

## **İletişim**

Eęer daha fazla bilgi isterseniz, ltfen benimle veya tez danıřmanlarımla temasa geçmekten ekinmeyiniz. İlginiz iin simdiden ok teřekkr ederim.

Arařtırmacı: řefika Mertkan-Öznl

Tel: +44 (0) 20 7481 8665; e-mail: [smertkan1@yahoo.co.uk](mailto:smertkan1@yahoo.co.uk)

Supervisors: Dr. Simon McGrath, The School of Education, University of Nottingham Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB

Tel: +44(0) 115 951 4508; e-mail: [simon.mcgrath@nottingham.ac.uk](mailto:simon.mcgrath@nottingham.ac.uk)

Professor Patricia Thomson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB

Tel: +44(0) 115 846 7248; e-mail: [patricia.thomson@nottingham.ac.uk](mailto:patricia.thomson@nottingham.ac.uk)

School of Education Research Ethics Coordinator: Dr. Andrew Hobson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB

Tel: +44(0) 115 951 4417; e-mail: [andrew.hobson@nottingham.ac.uk](mailto:andrew.hobson@nottingham.ac.uk)

Arařtırmaya gerekli izin alınır alınmaz bařlamak istiyorum. Yardımlarınız, ilginiz ve yönlendirmeniz iin ok teřekkr ederim.

Saygılarımla

řefika Mertkan-Öznl



**KUZEY KIBRIS TÜRK CUMHURİYETİ  
MİLLİ EĞİTİM VE KÜLTÜR BAKANLIĞI  
İLKÖĞRETİM DAİRESİ MÜDÜRLÜĞÜ**

**Sayı: İ.Ö. 0.00 35/2006/1-B**

**Lefkoşa**

**3.7.2006**

**Sn. Şefika Mertkan Özünü,,**

**“Okullardaki Liderlik Profili” konulu anketin soruları Talim ve Terbiye Dairesi Müdürlüğü tarafından incelenmiş ve uygulanmasında bir sakınca görülmemiştir.**

Anketi uygulamadan önce ilgili okul müdürlükleri ile temas kurulması ve uygulama tamamlandıktan sonra da anket sonuçlarının Müdürlüğümüze ve Talim Terbiye Dairesi Müdürlüğü'ne iletilmesi hususunda bilgilerinizi saygı ile rica ederim.

  
**Hatice Düzgün**  
**Müdür (a)**

/BD

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Tel (90) (392) 228 3136 - 228 6893  
Fax (90) (392) 227 6599  
E-mail meb@mebnet.net

**Lefkoşa-KKTC**



**KUZEY KIBRIS TÜRK CUMHURİYETİ  
MİLLİ EĞİTİM VE KÜLTÜR BAKANLIĞI  
GENEL ORTAÖĞRETİM DAİRESİ MÜDÜRLÜĞÜ**

Sayı: GOÖ.0.00-35/05/06- 1525

03.07.2006

Sayın Şefika Mertan Özünlü,

İlgi: 03.07.2006 tarihli yazınız.

İlgi başvurunuz Talim ve Terbiye Dairesi tarafından incelenmiş olup Müdürlüğümüze bağlı okullarda görev yapan yöneticilere yönelik hazırladığınız “Okullardaki Liderlik Profili” konulu anket sorularının uygulanması uygun görülmüştür.

Ancak anketi uygulamadan önce, anketin uygulanacağı okulun bağlı bulunduğu Müdürlükle istişarede bulunulup, anketin ne zaman uygulanacağını birlikte saptanması gerekmektedir.

Anketi uyguladıktan sonra ise sonuçlarının Talim ve Terbiye Dairesi Müdürlüğü’ne ulaştırması gerektiğini bilgilerinize saygı ile rica ederim.

  
Cuma Arıkbuka  
Müdür Muavini

CA/PC

Tel (90) (392) 228 3136 – 228 8187  
Fax (90) (392) 227 8639  
E-mail meb@mebnet.net

Lefkoşa-KIBRIS

**Appendix C: Ethics Statement**

# School of Education – Research Ethics Approval Form



The University of  
**Nottingham**

Name (Student) Sefika Mertkan  
Main Supervisor P Thomson/S McGrath  
Course of Study EdD  
Title of Research Project Capacity Building for Educational Reform: In-service Leadership Training (draft title)  
Is this a resubmission? No

Date statement of research ethics received by PGR Office: 8<sup>th</sup> December 2005

## Research Ethics Coordinator Comments:

This is a carefully thought through and thorough ethics proposal.  
I have raised a small number of minor points in relation to some of the wording on the participant information sheets (annotated copies are attached), which you might consider and discuss with your supervisors and revise if/where you feel appropriate.  
Good luck with the research.

Outcome:

Approved ☒

Revise and Resubmit ☐

Signed:

Name:

ANDY HOBSON  
(Research Ethics Coordinator)

Date:

14.12.2005



## Appendix Da: Survey (in Turkish)



The University of  
Nottingham

Sefika Mertkan-Ozunlu  
Doctoral Researcher, School of Education, University of Nottingham  
Jubilee Campus, Wollaton Road, Nottingham NG8 1BB  
[smertkan1@yahoo.co.uk](mailto:smertkan1@yahoo.co.uk); 0044 790 349 7798

Sadece resmi kullanım için

Ref:

### Bölüm 1: Kişisel Bilgiler

Yaş: \_\_\_\_\_

Cinsiyet: K ☐ E ☐

Doğum Yeri: \_\_\_\_\_

Elektronik Posta: \_\_\_\_\_

### Bölüm 2: İş Bilgileri

Pozisyon: \_\_\_\_\_

Okul: \_\_\_\_\_

Atanma Tarihi: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Haftalık Çalışma Saati: \_\_\_\_ p/w

Lütfen ana görevlerinizi liste halinde yazınız.

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Lütfen müdürlük görevinde karşılaştığınız zorlukları liste halinde yazınız.

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Lütfen daha önce bulunduğunuz pozisyonları liste halinde yazınız.

<u>Pozisyon</u>	<u>Okul / Organizasyon</u>	<u>Yıl</u>
Ör: Öğretmen	Sht. Tuncer İlkokulu	1982-1984

### Bölüm 3: Akademik Ünvanlar

Lütfen sahip olduğunuz akademik ünvanları üniversite/akademi eğitiminizden başlayarak liste halinde yazınız.

Mezuniyet Yılı	Kurum	Ünvan/Konu

### Bölüm 4: Liderlik Eğitimi

#### A. Hizmet Öncesi Liderlik Eğitimi

Bu bölüm müdürlük pozisyonuna atanmadan önce liderlik konusunda aldığınız resmi eğitim ile ilgilidir. Lütfen soruları cevaplarken bunu dikkate alınız.

Müdürlük mevkiine atanmadan önce liderlik konusunda hizmet öncesi resmi bir eğitim aldınız mı?

Evet ☐

Hayır ☐

Cevabınız evet ise lütfen aldığınız eğitim hakkındaki detayları tamamlayınız.

Kurs/Eğitim Adı	Yıl	Süre	Şehir	Eğitimi Veren Kuruluş	Eğitim Modeli e.g. seminer	Elde Edilen Ünvan

### Bölüm 5: Hizmet İçi Liderlik Eğitimi

Bu bölüm müdürlük mevkiine atandıktan sonra liderlik konusunda aldığınız eğitim hakkındadır. Lütfen soruları yanıtlarken bunu dikkate alınız.

Müdürlük mevkiine atandıktan sonra liderlik konusunda hizmet içi eğitim aldınız mı?

Evet ☐

Hayır ☐

Cevabınız evet ise lütfen aldığınız eğitim hakkındaki detayları tamamlayınız.

Kurs/Eğitim Adı	Yıl	Süre	Şehir	Eğitimi Veren Kuruluş	Eğitim Modeli e.g. seminer	Elde Edilen Ünvan

İlginiz ve ayırdığınız zaman için çok teşekkür ederim.

Appendix Db: Survey (in English)



Sefika Mertkan-Ozunlu  
Doctoral Researcher, School of Education, University of Nottingham  
Jubilee Campus, Wollaton Road, Nottingham NG8 1BB  
[smertkan1@yahoo.co.uk](mailto:smertkan1@yahoo.co.uk); 0044 790 349 7798

For official use only

Ref:

Please fill using BLOCK CAPITALS and tick (✓) the boxes when necessary unless stated otherwise.

Section 1: Personal Details

Please fill this section in full. Your name is requested for official use only and will be replaced by a pseudonym to protect your identity.

Forename: \_\_\_\_\_  
Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Gender: F ☐ M ☐  
Work Tel.: \_\_\_\_\_

Surname: \_\_\_\_\_  
Place of Birth: \_\_\_\_\_  
Home Tel.: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_

Section 2: Employment Details

Part 1: Current Employment

Position: \_\_\_\_\_  
Year Appointed to the Post: \_\_\_\_/\_\_\_\_/\_\_\_\_

Name of the School: \_\_\_\_\_  
Working Hours: \_\_\_\_ p/w

Please list your main duties.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please list the difficulties you face in your current position.


Part 2: Previous Employment

Please list the positions you have held prior to your current position.

<u>Position</u>	<u>School / Organization</u>	<u>From – To</u>

Section 3: Qualifications

Please list the qualifications you possess starting with the University degree.

From / To	Name of the Institution / Training Centre	Qualifications Obtained

Section 4: Leadership Training

Part 1: Initial Leadership Training

This section is about the leadership training you received before being appointed to your current position. Please consider this when answering the questions.

1. Have you received any formal initial leadership training before being appointed to your current position?

Yes ☐

No ☐

2. If yes, please provide the details below.

Title of the Event	Year	Duration	City	Name of the Institution / Training Provider	Type of the Training e.g. seminar, workshop	Qualifications Obtained

**Part 2: Continuous Professional Development**

Please note this section is about continuous professional development you had on leadership after you were appointed to your current position. Please consider this when answering the questions.

1. Have you had any professional development on leadership after being appointed to your current position?

Yes ☐ No ☐

3. If you answered 'yes' to question 1, please provide the details below.

Title of the Event	Year	Duration	City	Name of the Institution / Training Provider	Type of the Training e.g. seminar, workshop	Qualifications Obtained

Thank you very much for your participation.

## Appendix Ea: Information Sheet (in Turkish)

### Bilgi Formu

Nottingham Üniversitesinde doktora çalışmalarımı sürdürmekteyim. İlgimi çeken araştırma konularının başında eğitimde reform, değişim yönetimi, hizmet öncesi ve hizmet içi eğitim gelmektedir. Katılımınız rica olunan ve aşağıda detaylarını bulacağınız araştırma doktora tezimin temelini oluşturacaktır.

#### Araştırmanın Amacı

Bu araştırmanın amacı Kuzey Kıbrıs Türk Cumhuriyeti'nde sürdürülmekte olan hizmet içi liderlik eğitim stratejisini belirlemek ve bu stratejinin eğitimde sürdürülebilir değişimin sağlanabilmesi için nasıl geliştirilmesi gerektiğini incelemektir. Toplanan veri doktora tezimin ve yayınlanmak üzere yazılacak makalelerin temelini oluşturacaktır. Buna ek olarak Milli Eğitim ve Kültür bakanlığı tarafından gerekli görülürse bakanlığa sunulmak üzere bir rapor hazırlanacaktır.

#### Metod

Bu araştırmada nicel ve nitel veri toplama ve analiz yöntemleri kullanılacaktır. Okul müdürlerine anket yollanarak Kuzey Kıbrıs'taki okulların liderlik profili konusunda statistiki bilgi toplanacaktır. Okul müdürleri eğitim sisteminde üslendikleri liderlik rolü, liderlik konusunda liderlik konumuna atanmadan ve atandıktan sonra aldıkları hizmet içi eğitim konusunda nicel içelikli 90 dakikayı geçmeyen söyleşiler yapılacaktır. Bu söyleşiler uygun görülürse teybe çekilecektir. İkinci söyleşi ancak gerek görüldüğü takdirde yapılacaktır. Öğretmen sendikalarından ve Milli Eğitim Bakanlığında seçilecek kişilerle de yukarıda belirtilen konular hakkında söyleşiler yapılacaktır.

#### Gizlilik ve Hitap

Toplanan veri tamamen gizli olup veriler sadece araştırmacı ve hocaları tarafından incelenilecektir. Araştırmaya katılanların kimliği takma isimler kullanarak gizlenecektir. Gerekirse şahısların isim olmadan kimliğini ortaya çıkarabilecek unsurlar (ilçe, okul gibi) silinecektir.

#### Katılım

Bu araştırmaya katılım tamamiyle gönüllüdür. Bu araştırmadan gerek görüldüğü takdirde istediğiniz zaman ayrılabilirsiniz. Araştırmanın içeriğini anladığınıza ve katılmak istediğinize dair ilişikteki Katılımcı İzin formunu imzalamanız gerekmektedir.

## **İletişim**

Eğer daha fazla bilgi isterseniz, lütfen benimle veya tez danışmanlarımla temasa geçmekten çekinmeyiniz. İlginiz için simdiden çok teşekkür ederim.

Araştırmacı: Şefika Mertkan-Özünü

Tel: +44 (0) 20 8245 3218/ +44 (0) 790 349 7798;

e-mail: [smertkan1@yahoo.co.uk](mailto:smertkan1@yahoo.co.uk)

Tez Danışmanları: Dr. Simon McGrath, The School of Education, University of Nottingham Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB  
Tel: +44 (0)115 951 4508; e-mail: [simon.mcgrath@nottingham.ac.uk](mailto:simon.mcgrath@nottingham.ac.uk)

Professor Patricia Thomson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB  
Tel: +44(0) 115 846 7248; e-mail: [patricia.thomson@nottingham.ac.uk](mailto:patricia.thomson@nottingham.ac.uk)

School of Education Research Ethics Coordinator: Dr. Andrew Hobson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB  
Tel: +44(0) 115 951 4417; e-mail: [andrew.hobson@nottingham.ac.uk](mailto:andrew.hobson@nottingham.ac.uk)

Yardımlarınız ve ilginiz için çok teşekkür ederim.

Saygılarımla

Sefika Mertkan-Ozunlu



## Appendix Eb: Informed Consent Form (in Turkish)

### KATILIMCI İZİN FORMU

**Araştırmacı: Şefika Mertkan-Özünlü**

**Tez Danışmanları: Dr. Simon McGrath; Professor Patricia Thomson**

- Katılımcı Bilgi formunu okudum ve araştırmacının amacı ve içeriği bana açıklandı. Araştırmayı anladım ve katılmak istiyorum.
- Araştırmacının amacını ve benim rolümü anlamış bulunuyorum.
- Bu araştırmaya katılıma gönüllü olduğumu anladım. Araştırmadan istediğim zaman ayrılabilirim. Bu şu anki ve ilerideki mevkiimi etkilemeyecektir.
- Bu araştırmada toplanan verilerin yayınlanabileceğini ve gerek görülürse Milli Eğitim Bakanlığına sunulmak üzere bir rapor hazırlanacağını, hazırlanan rapor ve yayınlarda benim kimliğimin tamamen gizli tutulabilmesi için araştırmacının gerekli her türlü önlemi alacağını anladım.
- Benimle yapılma ihtimali olan söyleşilerin benim rızam ile kasete çekileceğini anladım.
- Araştırma verilerinin anket, nicel içerikli söyleşiler ve araştırmacının tutacağı notlar yoluyla toplanacağını anladım.
- Toplanan verinin güvenli bir yerde tutulacağını ve sadece araştırmacı ve tez danışmanları tarafından ulaşılabileceğini anladım. Araştırma verilerinin sadece araştırma amacına uygun kullanılacağını anladım.
- Gerek görüldüğü takdirde araştırmacı, tez danışmanları veya etik konulardan sorumlu kordinatörle iletişime geçebileceğimi ve şikayetlerimi bu kişilerden birine iletebileceğimi anladım.

İmza ..... (katılımcı)

İsim ..... Tarih .....

## **İletişim Bilgileri**

**Araştırmacı:** Sefika Mertkan Özünlü

Tel: 020 8245 3218 / 0790 349 7798; e-mail: [smertkan1@yahoo.co.uk](mailto:smertkan1@yahoo.co.uk)

**Tez danışmanları:** Dr. Simon McGrath, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB  
Tel: +44(0) 115 951 4508; e-mail: [simon.mcgrath@nottingham.ac.uk](mailto:simon.mcgrath@nottingham.ac.uk)

Professor Patricia Thomson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB  
Tel: +44(0) 115 846 7248; e-mail: [patricia.thomson@nottingham.ac.uk](mailto:patricia.thomson@nottingham.ac.uk)

**School of Education Research Ethics Coordinator:** Dr. Andrew Hobson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB  
Tel: +44(0) 115 951 4417; e-mail: [andrew.hobson@nottingham.ac.uk](mailto:andrew.hobson@nottingham.ac.uk)

# Appendix Ec: Informed Consent Form (in English)

## PARTICIPANT CONSENT FORM

**Researcher's name:** Şefika Mertkan-Özünlü

**Supervisors' names:** Dr. Simon McGrath; Professor Patricia Thomson

- I have read the Participant Information Sheet and the nature and purpose of the research project has been explained to me. I understand and agree to take part.
- I understand the purpose of the research project and my involvement in it.
- I understand that participation in the study is on voluntary basis. I may withdraw from the research project at any stage and that this will not affect my status now or in the future.
- I understand that while information gained during the study may be published, all necessary steps will be taken by the researcher to assure my anonymity and the confidentiality of my personal results.
- I understand that I will be audiotaped during the interviews.
- I understand that data will be generated through audiotaped interviews, surveys and personal field notes of the researcher.
- I understand that both hard and electronic copies of data generated will be kept in a secure location and will be used purely for research purposes and the dissemination of findings. Access will be granted only to supervisors and examiners.
- I understand that I may contact the researcher or supervisor if I require further information about the research, and that I may contact the Research Ethics Coordinator of the School of Education, University of Nottingham, if I wish to make a complaint relating to my involvement in the research.

**Signed** ..... (research participant)

**Print name** ..... **Date** .....

## Contact details

Researcher: Sefika Mertkan Özünlü

Tel: 020 7481 8665; e-mail: [smertkan1@yahoo.co.uk](mailto:smertkan1@yahoo.co.uk)

Supervisors: Dr. Simon McGrath, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB

Tel: +44(0) 115 951 4508; e-mail: [simon.mcgrath@nottingham.ac.uk](mailto:simon.mcgrath@nottingham.ac.uk)

Professor Patricia Thomson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB

Tel: +44(0) 115 846 7248; e-mail: [patricia.thomson@nottingham.ac.uk](mailto:patricia.thomson@nottingham.ac.uk)

School of Education Research Ethics Coordinator: Dr. Andrew Hobson, The School of Education, University of Nottingham, Jubilee Campus, Wollaton Road, Nottingham, NG8 1BB

Tel: +44(0) 115 951 4417; e-mail: [andrew.hobson@nottingham.ac.uk](mailto:andrew.hobson@nottingham.ac.uk)